

# 「COVID-19ワクチン接種進展による観光関連市場の変化について:

## 日本・沖縄の観光復活に向けた対策とは」

Planning an Exit Strategy from the Pandemic by riding on surge in  
Tourism Demands for Japan and Okinawa –  
lessons from Orlando, FL, USA

2021年10月5日

会場 : Zoom Webinar from Orlando, Florida, USA  
hosted by the Okinawa Development Finance Corporation

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ローゼン・ホスピタリティ経営学部 テニユア付准教授

原 忠之

# 今日の内容 (Total 54 pages)

- 0. Overview (P2-3)
- 1. オーランドの現状確認 (P4-13)
- 2. 世界から見た日本の位置確認 (P14-20)
- 3. 米国観光需要急復興の要因 (P21-33)
- 4. 日本観光需要急復興ロードマップ (P34-38)
- 5. マクロ外的環境把握：より広い公共政策問題  
確認と米国事例から応用する沖縄観光復興戦略案 (P39-54)

# 0. Confirmation of Goals 組織の目的

## • 企業の目的は(米国のファイナンス授業での定義)?

- 当期利益最大化による株主価値最大化
- Maximize Shareholder Values by maximizing profit

## • 中央政府・地方政府の目的は?

Ultimate National/Regional Goal for government?

- 納税者の生活水準の質の維持・向上
- Maintain & Improve Quality of lives of taxpayers (CS)

## • それを如何に達成するのか How?

### – 域外からの輸出資金獲得

- 20世紀後半成功した日本の輸出主導型製造業ビジネスモデルが21世紀に入り、相対的国際競争力低下

### – ➡「輸出産業としての観光」奨励による外貨獲得

Rely on Tourism as an Industry (to secure alternative export revenues)

# 1-1. 2021年晩夏オーランドの現状



Source: [MEGACON Orlando 2021 Highlights - YouTube](#)

▶ ◀ 🔊 0:09 / 1:35

⏮ ⏪ ⏩ ⏭ 📺 ⚙️ 🔍



# 1-2.2021年晩夏オーランドの現状

Hi Rosen College Team,

We have employers on campus the first week of school, here to hire and make offers for internships and jobs on the spot! Please share this with your students during the first week of school. Also, ask them to follow our **Instagram Page** to stay up to date on weekly opportunities. *Employers will be on campus all semester to recruit.*



UCF

UNIVERSITY OF CENTRAL FLORIDA

**Rosen College of  
Hospitality Management**

## RECRUITMENT TABLING

**Meet Industry Recruiters by the Courtyard on Campus**

**10:00 a.m. - 2:00 p.m.**

**Monday, August 23**



**Tuesday, August 24**



**Wednesday, August 25**



**Thursday, August 26**



# 2021年晩夏米国の現状(1-3)

## ワクチン接種必要 企業リスト

- United Airlines, American Airlines,
- Amtrak, Anthem, BlackRock, Cisco, Citigroup, CVS Health, Deloitte, DoorDash, Equinox, Facebook, Ford, Goldman Sachs, Google, Lyft, MGM Resort, Microsoft, Morgan Stanley, NBC, Netflix, NYT, Saks, Twitter, Tyson Foods, Uber, Walgreens, Walt Disney, Walmart, Washington Post, 等
- 流れが変わった感覚
- 接種率50%が一つの目安か。
- Disney is requiring all of its new, salaried and non-union hourly employees to get vaccinated before heading to work. "Employees who aren't already vaccinated and are working on-site will have **60 days from today to complete their protocols**, and any employees still working from home will need to provide verification of vaccination prior to their return, with certain limited exceptions," the company said in part in an emailed statement. **"Vaccines are the best tool we all have to help control this global pandemic and protect our employees."**

## Delta Air Lines Is Going To Start Charging Unvaccinated Employees \$200 Per Month

August 25, 2021 - 11:07 AM ET

THE ASSOCIATED PRESS



People sit under Delta sign at Salt Lake City International Airport on July 1, 2021. Delta Air Lines won't force employees to get vaccinated, but it's going to make unvaccinated workers pay a \$200 monthly charge.

Rick Bowmer/AP

# 1-4.オーランド観光産業への影響

## Hotel & Flight Demand (% of same month in 2019)

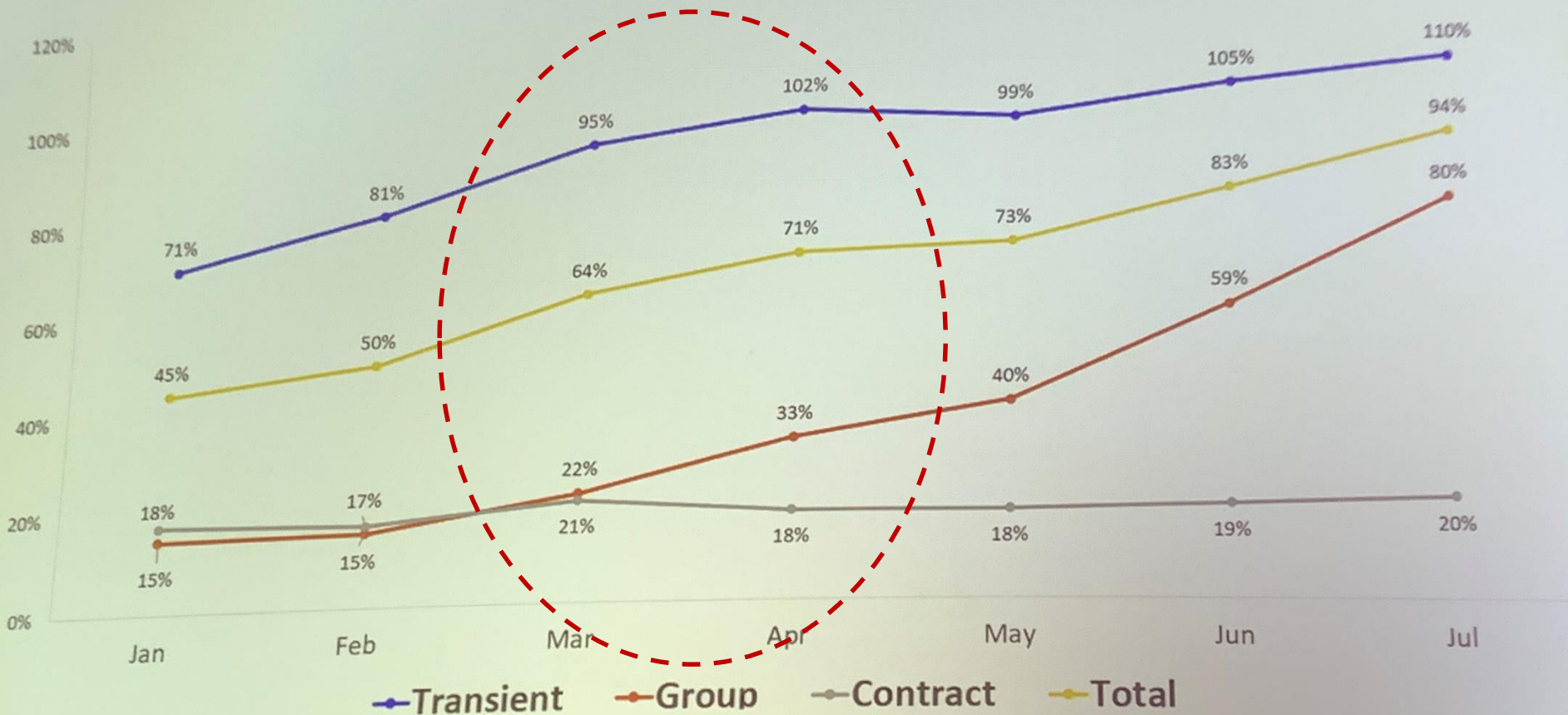




# 1-5.オーランド観光産業への影響

## Metro Orlando Hotel Demand

(% of same month in 2019)



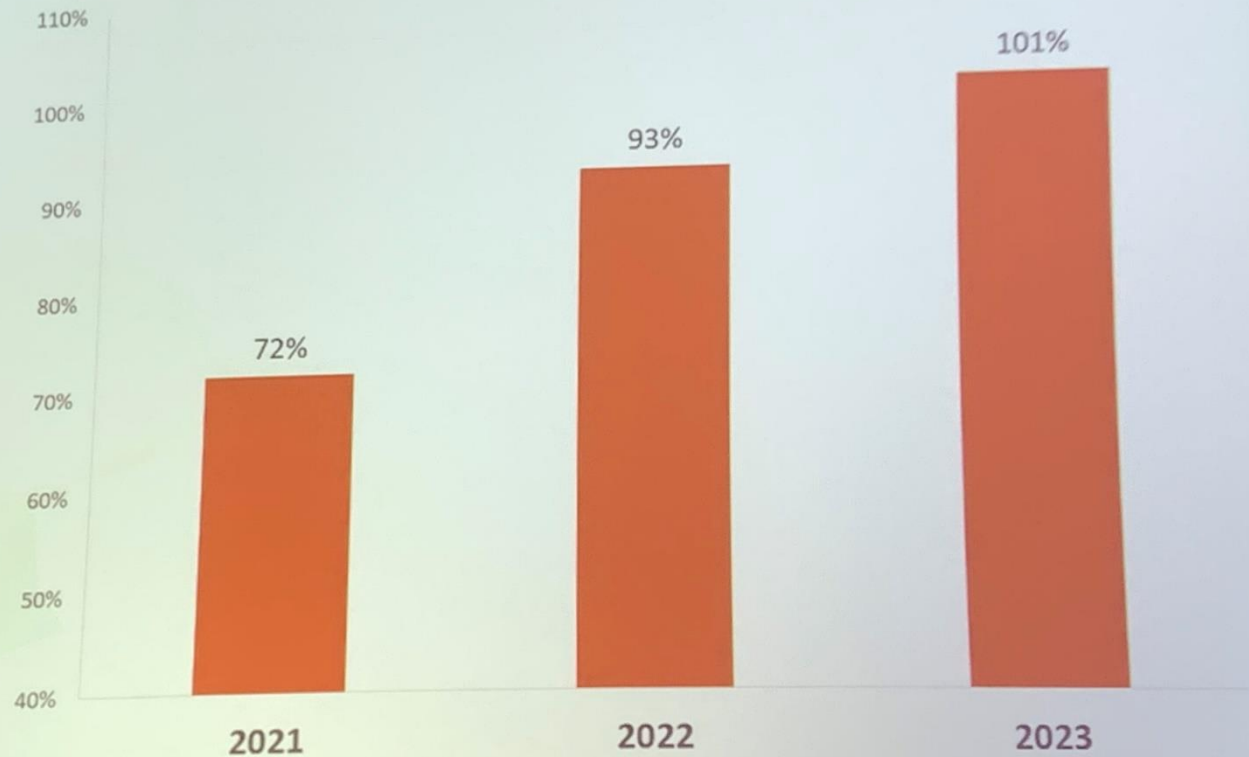


# 1-6.オーランド観光産業への影響



## Three-Year Projections

Room night demand, % of 2019



# 1-7.オーランドMICE業務への影響

## 2021: Leading the Way Back for Safe Citywide Conventions



**86**

groups booked  
for this year



**891,000**

Projected  
attendees

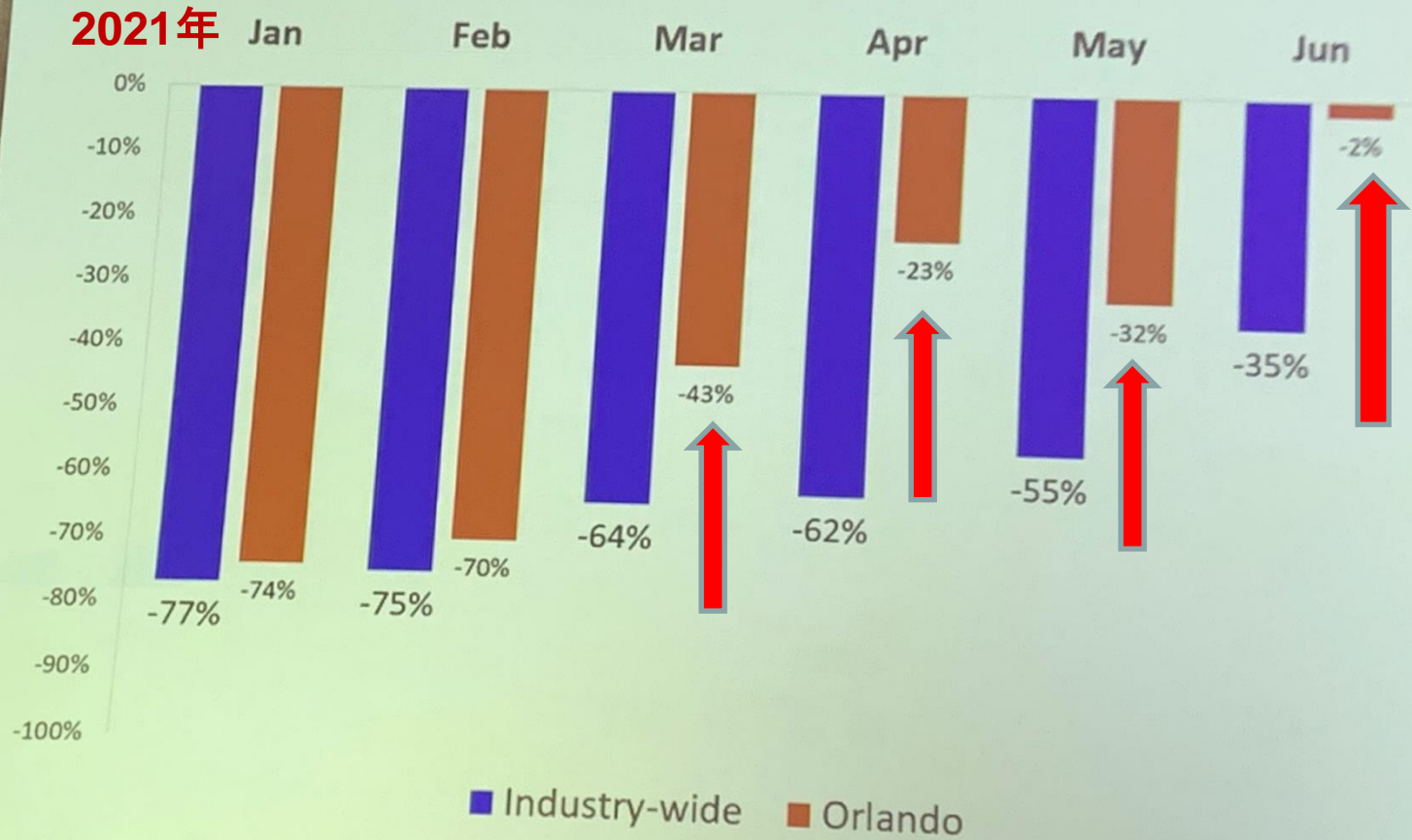


# 1-8.オーランドMICE業務への影響



## Cvent RFP Lead Volume

Monthly levels vs. 2019

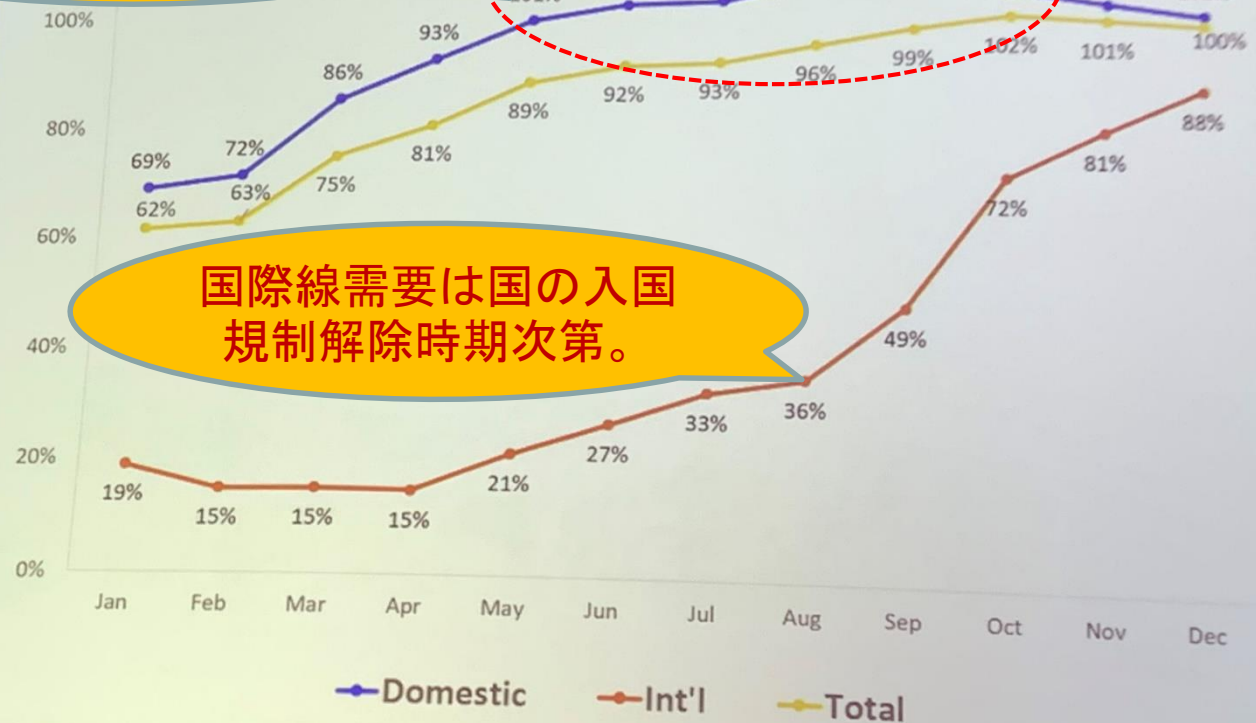


# 1-9.オーランド国際空港 (MCO)実績

## OLA Seat Capacity (Percentage of 2019)

2021年5月から国内線  
需要は2019年超え

国際線需要は国の入国  
規制解除時期次第。

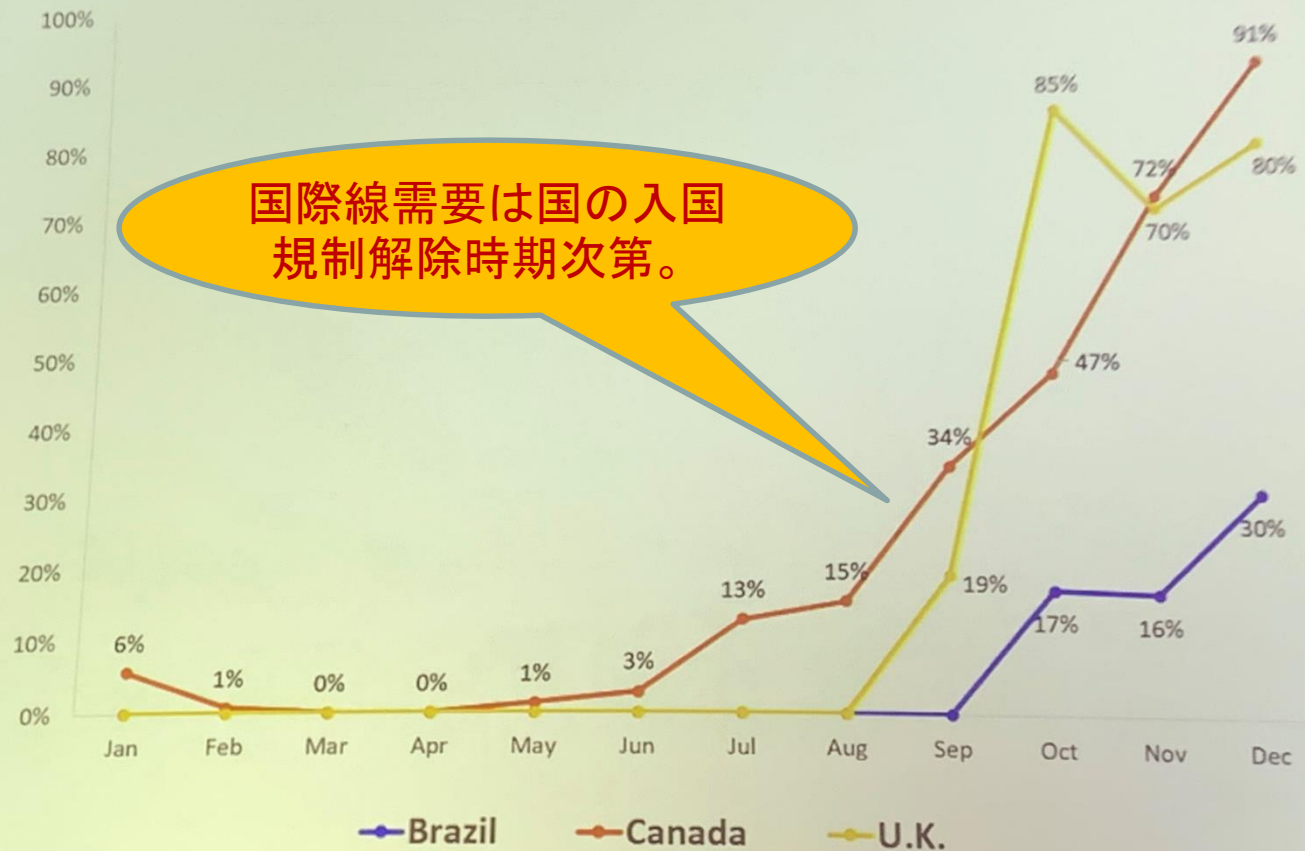




# 1-10.オーランド国際空港 (MCO)実績



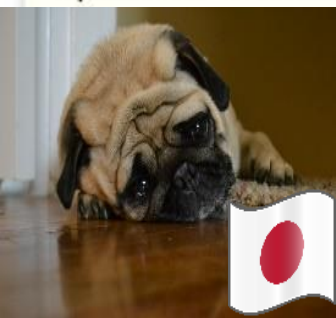
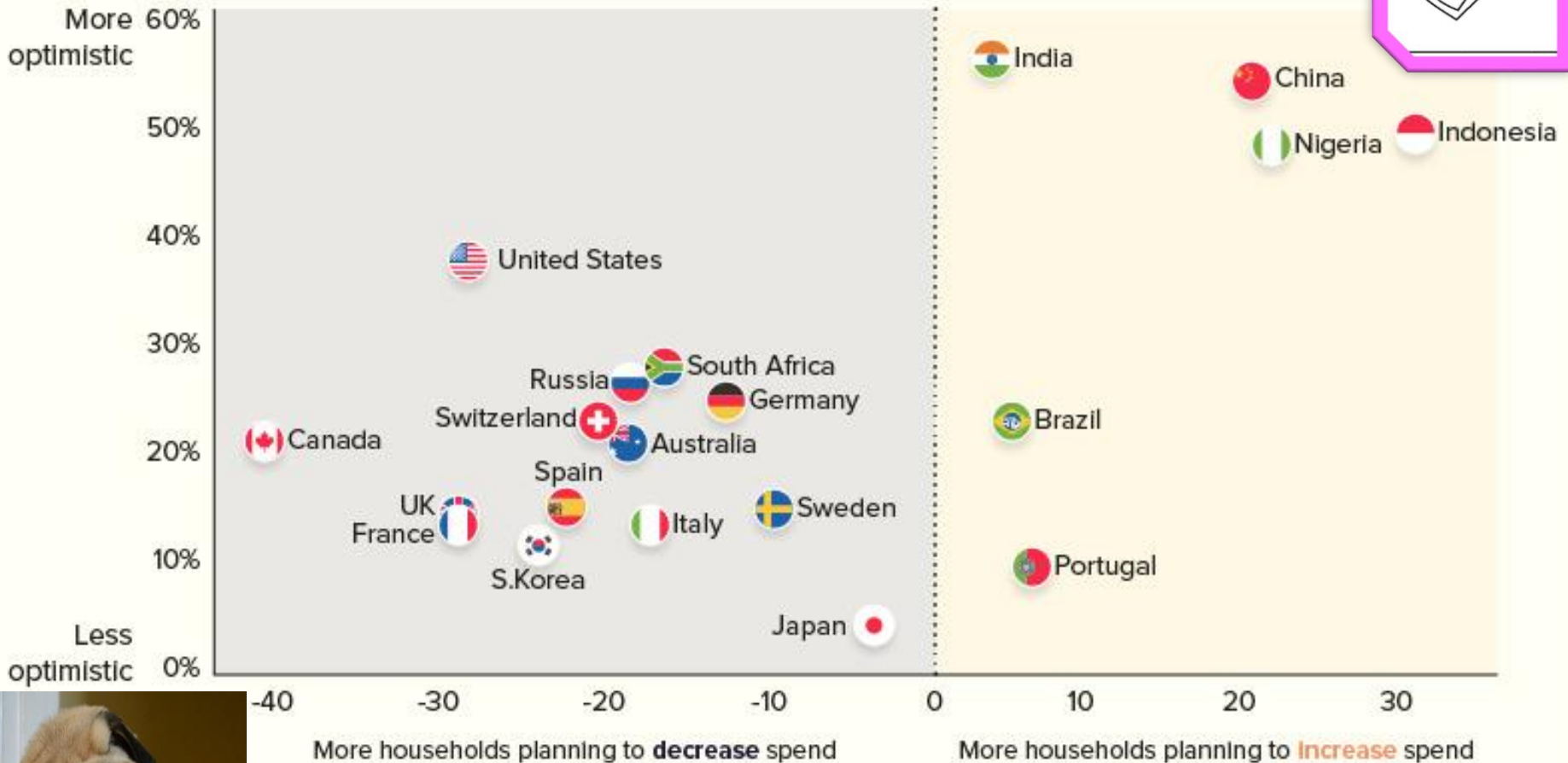
## OLA Seat Capacity (Percentage of 2019)



# 第二章 2-1.[1年前総括]日本人バイアスの存在

## Optimism about country's economic recovery after COVID-19

% of respondents



## 2-2. 過去1年間の報道

### These could be the most popular travel destinations after COVID-19

Source: World Economic Forum 05-NOV-2020



Visitors wearing protective face masks practice social distancing as they offer prayers at a temple at Asakusa district, a popular sightseeing spot, amid the coronavirus disease (COVID-19) outbreak in Tokyo, Japan October 13, 2020.

Image: REUTERS/Issei Kato

05 Nov 2020

**Trevor Weltman**

Chief of Staff, PATA

**Maksim Soshkin**

Research and Analyst, World Economic Forum

**Jessica A. Bell**

Senior Program Officer, Nuclear Threat Initiative

- Health and safety could drive travel bookings after the pandemic.
- The quality of health response during the pandemic could impact a destination's competitiveness.

Health and hygiene have always played a crucial part in global travel and tourism competitiveness. Now COVID-19 is turning them [into even more important factors](#), and could be reshaping the map of the most popular travel destinations in the process.

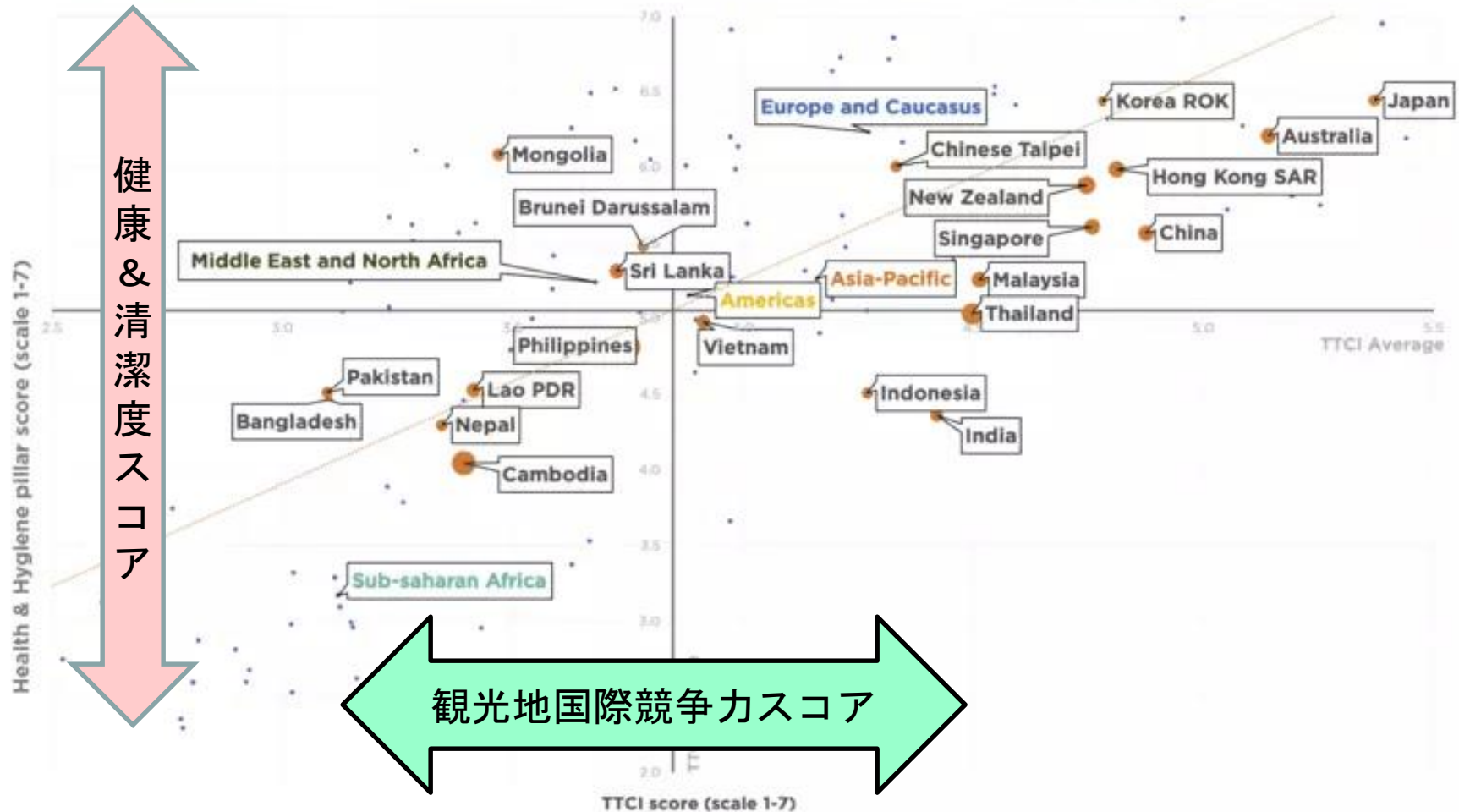
[According to a new report by Pacific Asia Travel Association \(PATA\)](#) in collaboration with the





## 2-3. 過去1年間の報道

### HEALTH AND HYGIENE VS TRAVEL AND TOURISM COMPETITIVENESS



Source: World Economic Forum and World Travel & Tourism Council (WTTC)

Note: Size of circle is based on the 2019 total travel and tourism industry share of GDP per country (applied to only Asia-Pacific economies).



## 2-4. 過去1年間の報道

TTCI - TOP APAC DESTINATIONS

	Health and Hygiene Rank	Overall Global Rank/Score
Japan	16	4
ROK	17	16
Australia	27	7
New Zealand	47	18
Singapore	60	17
PRC	62	13
Malaysia	75	29
Thailand	88	31
Vietnam	91	63
Indonesia	102	40
India	105	34

Source: World Economic Forum

The Travel & Tourism Competitiveness Report 2019 Image: World Economic Forum

### Japan and Australia

For example, [Japan](#) and [Australia](#) ranked highly for destination competitiveness before the pandemic. They both mounted strong responses to COVID-19, but others reported even fewer cases. In theory this could nudge tourists towards those other Asia Pacific destinations, such as Vietnam and Thailand, that have had very few cases by global comparison.

On the other hand, when compared to other countries in the world, Japan and Australia have been successful in controlling the pandemic, and also have a long history as top destinations given their cultural and natural assets. By marketing themselves as health-aware given their strong underlying health and hygiene infrastructure, as well as destinations offering unique cultural and nature-related experiences, they will likely retain their competitive edge.

ダイヤモンドオンライン2020年5月1日「コロナの統計分析、ダイヤモンド・プリンセス号で分かった7つの教訓：

「人口に占める感染者数の比率は急速に上昇するが20%程度で収まり、その9割が軽度で終わる。しかし、5%の人は重症化する。手当をすれば死亡者はその半分以上の2%に抑えられるが、医療崩壊すれば重症化した人は助からない可能性が高い。

医療崩壊とは、コロナ以外の手当もできなくなることであるから、他の疾病での死者も激増するだろう。何もしなければ、人口1億2600万人の日本において、新型コロナウイルスだけによっても50万人が死亡し、医療崩壊すれば100万人以上が死亡しかねないということを意味する。」

対比

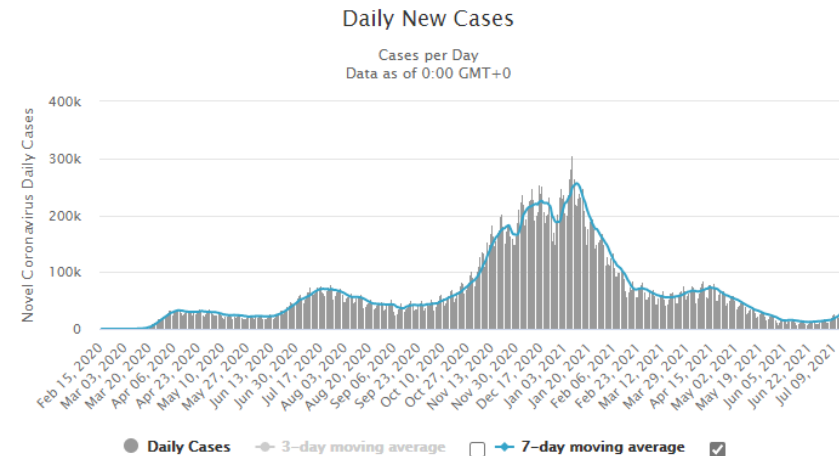
# 2-5. 最優先政策目標の相違

## • 最優先政策目標の相違

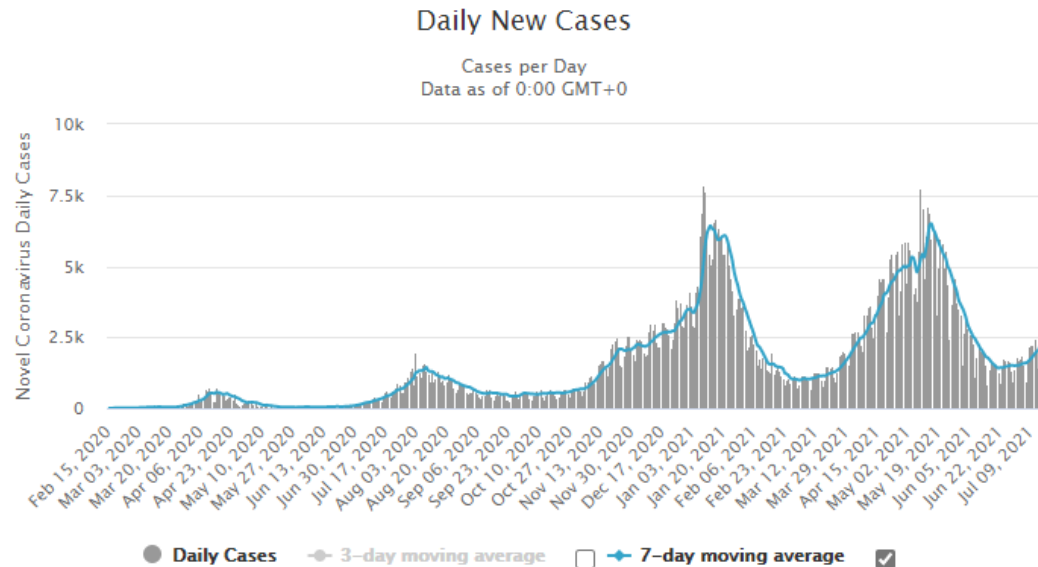
<https://www.worldometers.info/coronavirus/#countries>

– 日本: 感染者数 「英米は狂気の沙汰」に見える？

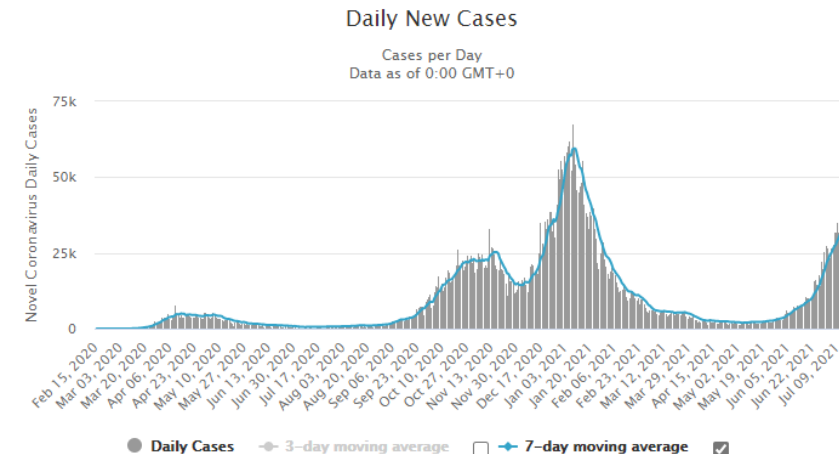
Daily New Cases in the United States



Daily New Cases in Japan



Daily New Cases in the United Kingdom

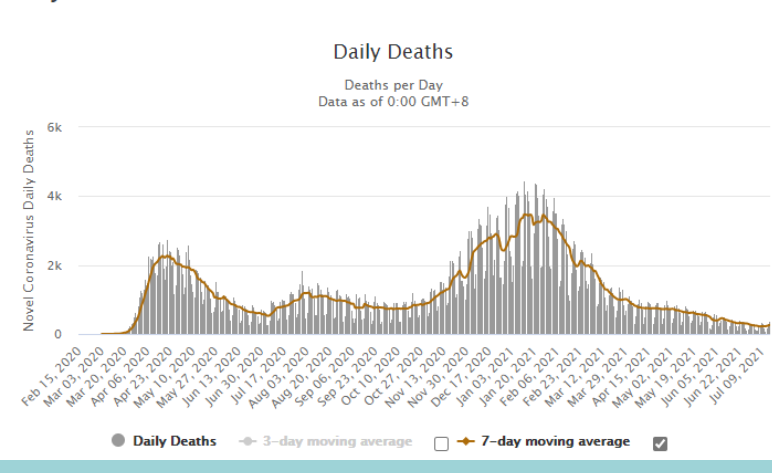


# 2-6. 最優先政策目標の相違

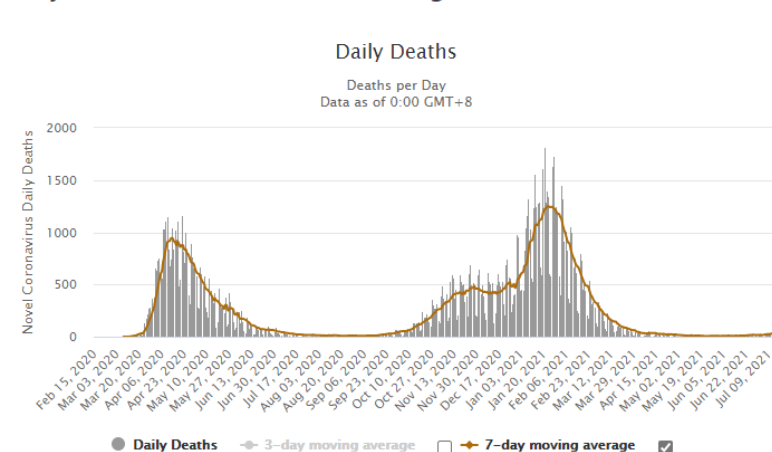
## • 最優先政策目標の相違

– 英米:死亡者数抑制 「感染しても死ななければ98%治るでしょう？」

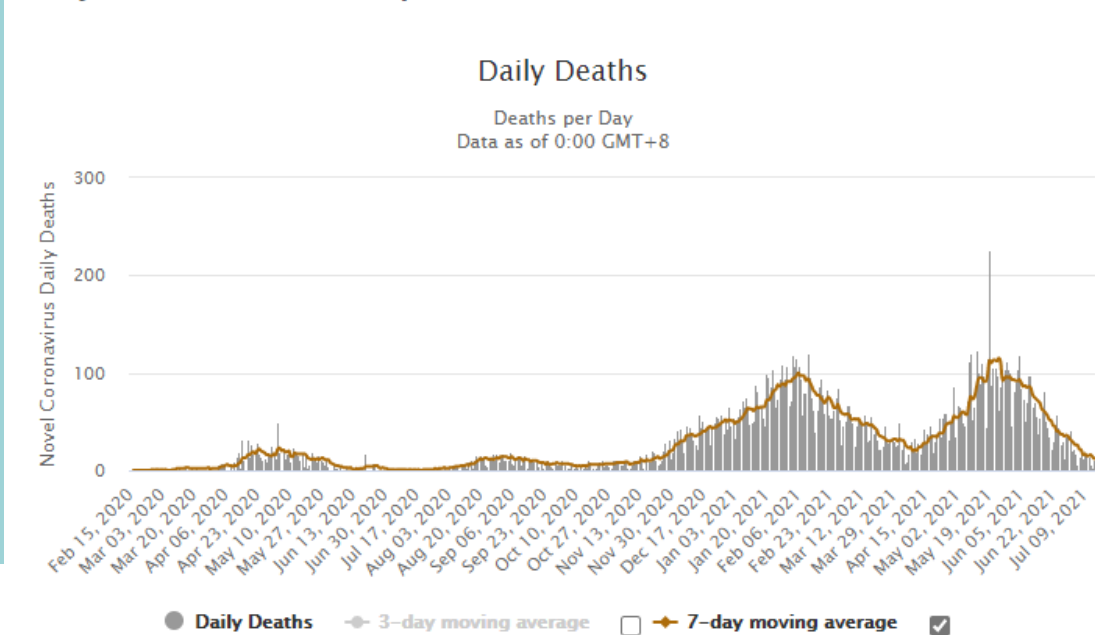
Daily New Deaths in the United States



Daily New Deaths in the United Kingdom



Daily New Deaths in Japan



# 2-7.世界各国との相対感乖離に注意要(1/2)

## 世界上位10か国と日本のデータ比較表：2021年9月26日世界各国データ

国名	総感染者数	新規感染数	総死者数	新死亡数	総回復者数	百万人当たり感染者数	百万人当たり死者数	国家総人口
World	232,575,067	321,105	4,761,430	4,800	209,189,782	29,837	610.8	
1 <a href="#">USA</a>	43,750,920	24,280	706,313	255	33,186,136	131,229	2,119	<a href="#">333,394,863</a>
2 <a href="#">India</a>	33,678,243	27,022	447,225	277	32,924,420	24,112	320	<a href="#">1,396,716,723</a>
3 <a href="#">Brazil</a>	21,351,972	8,668	594,443	197	20,333,908	99,580	2,772	<a href="#">214,421,321</a>
4 <a href="#">UK</a>	7,664,230	32,417	136,168	58	6,185,570	112,172	1,993	<a href="#">68,325,553</a>
5 <a href="#">Russia</a>	7,420,913	22,498	203,900	805	6,604,604	50,824	1,396	<a href="#">146,011,636</a>
6 <a href="#">Turkey</a>	7,039,500	25,861	63,166	228	6,497,275	82,375	739	<a href="#">85,456,785</a>
7 <a href="#">France</a>	6,994,319	4,706	116,463	14	6,723,045	106,862	1,779	<a href="#">65,451,605</a>
8 <a href="#">Iran</a>	5,533,520	13,792	119,360	288	4,944,087	64,859	1,399	<a href="#">85,316,587</a>
9 <a href="#">Argentina</a>	5,250,402	562	114,862	13	5,111,596	114,872	2,513	<a href="#">45,706,676</a>
10 <a href="#">Colombia</a>	4,951,675	1,422	126,145	43	4,791,715	96,054	2,447	<a href="#">51,550,853</a>
24 <a href="#">Japan</a>	1,692,387	2,674	17,453	32	1,633,775	13,432	139	<a href="#">125,998,778</a>

Source: made by T. Hara based data from [Worldometers.info](#) as of 9/26/2021



### 3. 米国から学ぶCOVID-19後: 観光産業復興の処方箋



6/30/2021 at Chicago O'Hare Airport (ORD) photo by Tad Hara

# 3-1.個人給付金 計3回給付



PETER G.  
PETERSON  
FOUNDATION

THE FISCAL  
CHALLENGE

FINDING  
SOLUTIONS

WHAT WE'RE  
DOING

WHAT  
CAN

[Home](#) | [Blog](#) | [How Did Americans Spend Their Stimulus Checks And How Did It Affect The Economy?](#)

The federal government is providing three rounds of direct payments, costing about \$850 billion, to taxpayers

Round of Payment	Amount of Payment	Maximum Income to Receive Payment	Budgetary Cost (2020-2030)
<b>First Round</b>  (CARES Act)	\$1,200 per adult  \$500 per child	Single: \$99,000  HOH: \$136,500  Married: \$198,000	\$292 billion
<b>Second Round</b>  (Consolidated Appropriations Act)	\$600 per adult  \$600 per child	Single: \$87,000  HOH: \$124,500  Married: \$174,000	\$164 billion
<b>Third Round</b>  (American Rescue Plan)	\$1,400 per adult  \$1,400 per child	Single: \$80,000  HOH: \$120,000  Married: \$160,000	\$411 billion

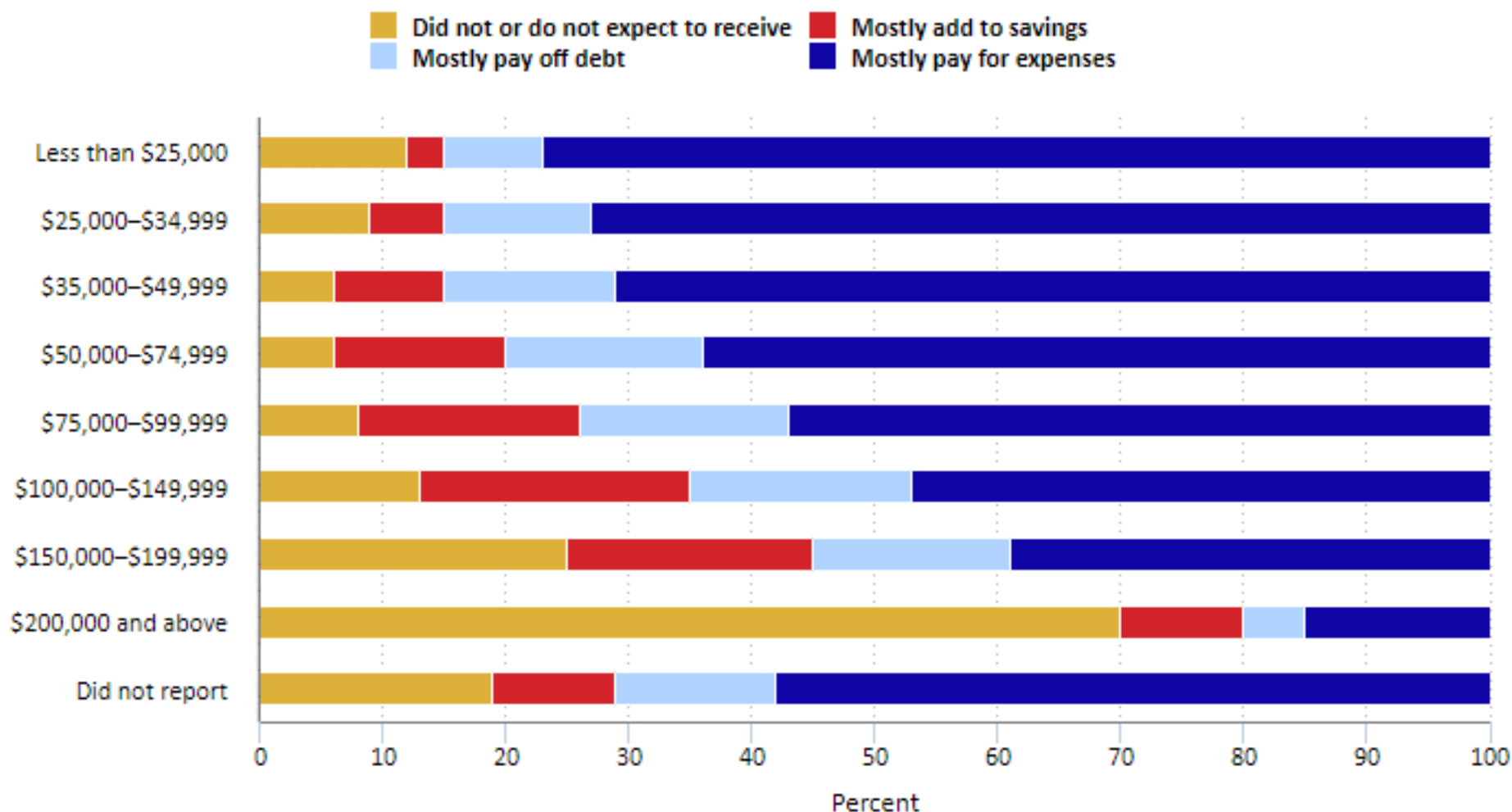
SOURCES: Various cost estimates from the Congressional Budget Office.

NOTES: HOH refers to the head-of-household tax filing status. The amount of each payment for married couples filing jointly was twice the size of the payment listed for singles above. For each round of payments, the amount started phasing out at an income level of \$75,000 for singles, \$112,500 for heads of households, and \$150,000 for married couples.

ROSE  
GOLD

## 3-2.初回給付金所得水準別使途

Chart 2. Stimulus payment use, by household gross income, June 11–June 16, 2020



Click legend items to change data display. Hover over chart to view data.

Note: Not all rows sum to 100 due to rounding.

Source: U.S. Census Bureau, Household Pulse Survey.

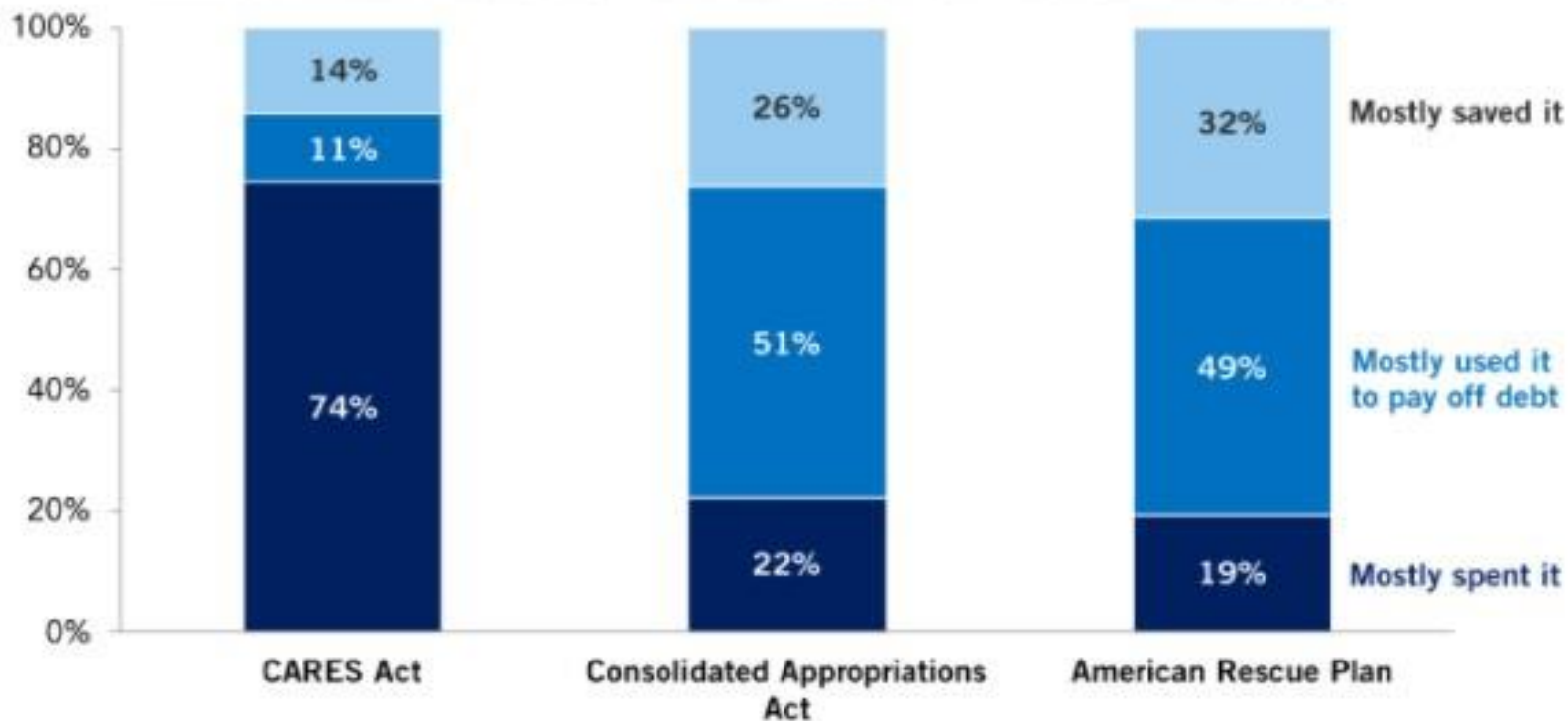


# 3-3. 3 回給付金別使途内訳



Households were more likely to spend their first stimulus check and save or pay off debt with their second and third payments

SHARE OF PAYMENT RECIPIENTS USING THE MONEY FOR SPECIFIED REASON (%)



SOURCES: United States Census Bureau, Household Pulse Survey: Week 12, 22, and 27, April 2021.

NOTES: The data for the CARES Act payments are as of July 2020 and reflect spending patterns of all households that had received, or expected to receive, a payment as of that date. The data for the Consolidated Appropriations Act and American Rescue Plan are as of January and March 2021, respectively, and reflect spending patterns for households that had received a payment in the last 7 days. Those dates reflect when the majority of each round of payments were sent out.

# 3-4.GDP計算式

$$Y \text{ (GDP)} = C + I + G + (EX - IM)$$

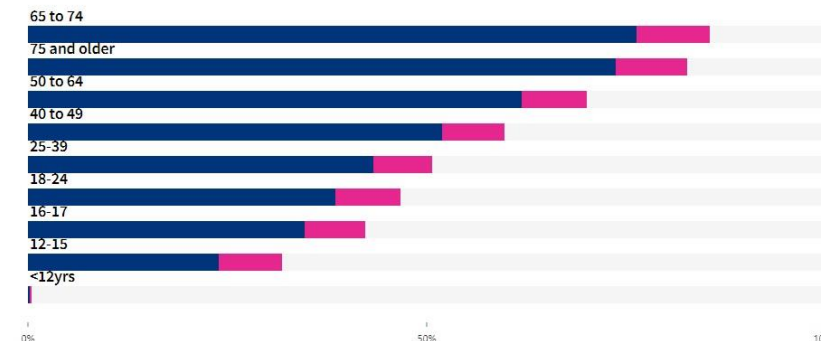
- この右辺はConsumption, Investment, Government Expenditure, (Export minus Import)、すなわち個人消費+企業投資+政府支出+(輸出-輸入)です。最後の部分は輸出から輸入を引いたものです。右辺を全て足すと100%となります。
- 日本の場合はCが54%、Iが25%、Gが20%で貿易が1%、  
米国の場合はCが70%、Iが18%、Gが17%で貿易が-5%。
- 日米両国ともに**個人消費が右辺で一番大きい点**がポイント。これは「**個人消費が国の総生産に一番大きな影響力を及ぼす**」という事。ここで興味深いのは、個人の消費動向、意識・心持ちが個人消費に影響を及ぼす点。将来に不安を感じる時に大きな買い物や旅行はしない。実はその「**個人の消費動向、意識・心持ち**」が米国経済と観光需要急減・急復活の大きな要因。



What percentage of people in each age range received the COVID-19 vaccine? ⓘ

Percent of people by age receiving **at least one dose** or **fully vaccinated**.

According to the Centers for Disease Control and Prevention, there is age information for **92%** of people who received **at least one dose** and **92%** of **fully vaccinated** people.



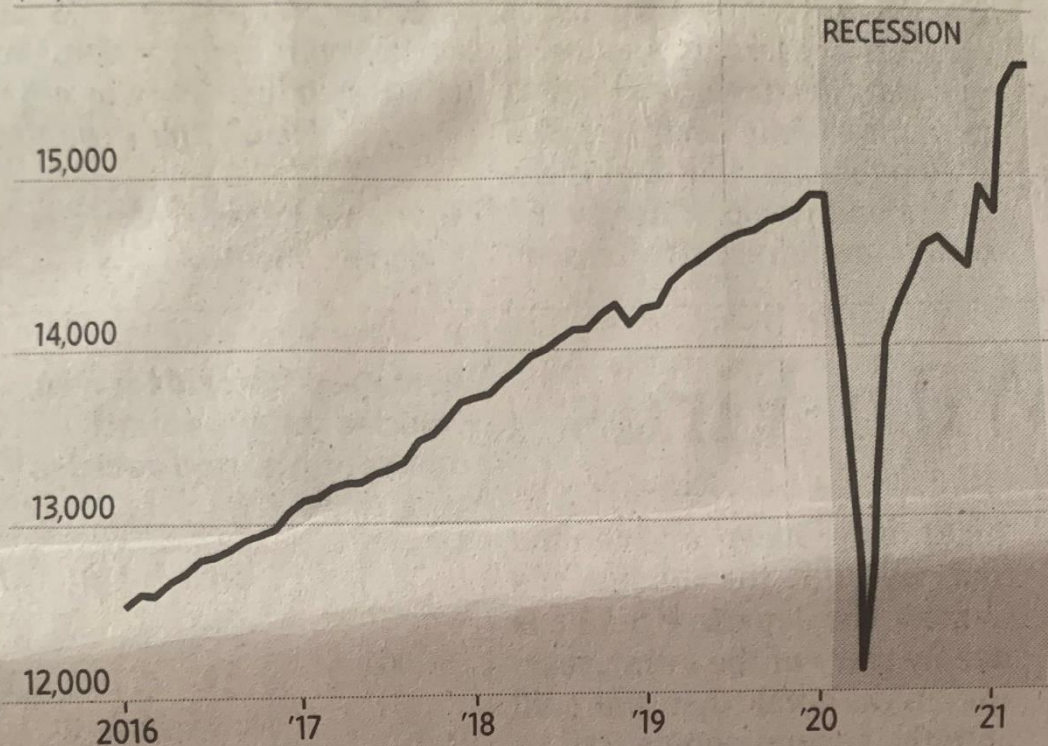
Walk in or  
schedule your  
**FREE COVID-19  
vaccine today.\***

Schedule a COVID-19 vaccine

# 3-5.消費額と貯蓄率

## Personal consumption expenditures

\$16,000 billion



Note: Seasonally adjusted at annual rates

Source: Commerce Department via St. Louis Fed (expenditures)



## Saving Up

U.S. households have boosted savings during the pandemic.

## Personal-saving rate

35% RECESSION



Note: Seasonally adjusted at annual rate

Source: Commerce Department

But households also stashed much of the money. Households are now sitting on a historically large pile of cash. Their savings totaled \$3.9 trillion last month, up from \$1.4 trillion last February.

- (1) 消費激減と貯蓄率急騰が同時に発生した。
- (2) 個人給付金が将来の不確実性への準備金として貯蓄増と借金軽減に。
- (3) 高齢者からワクチン接種が進む→将来の不安減少＝準備金必要性減少→復讐消費爆発
- (4) 外食、芸術エンタメ、宿泊産業に支出



# 3-6. 好景気による消費行動と借入需要

## Consumers Borrow at Record Level

7/9/2021 WST BI

By ANNA MARIA ANDRIOTIS

Americans are borrowing again, in some cases at levels not seen in more than a decade.

Consumer demand for auto loans and leases, general-purpose credit cards and personal loans rose 39% in April from a year earlier, according to credit-reporting firm **Equifax Inc.**

It also increased 11% from April 2019, according to Equifax, which measured how often lenders checked consumers' credit reports to make loan decisions.

Lenders are meeting the moment. Equifax said lenders extended a record number of auto loans and leases in March, the latest month for which data are available.

They also bumped up credit-card originations, issuing more general-purpose credit cards than any other March on record. Equifax's data go back to 2010.

It is quite the reversal from 2020, when many people shunned credit cards, personal loans and other types of debt. Some didn't need to borrow because stimulus checks, expanded unemployment bene-

fits and a surging stock market padded their checking accounts.

But many didn't want to spend money when they were worried about getting laid off, and others, stuck at home, had nothing to buy.

But with vaccinations readily available in the U.S. and the economy reopening, many Americans are newly confident in the economy after hunkering down last year.

They are splurging on cars, vacations and eating out. Higher prices, especially for cars and trucks, have also stoked loan demand.

"There's a significant increase in consumer-credit demand and a growing appetite to use credit on things like those vacations that were postponed for 18 months," said Tom Aliff, senior vice president of analytics consulting at Equifax.

Felipe Betancor signed up for the American Express Platinum card in April after nearly two years of not applying for a credit card. Mr. Betancor, of Greenville, S.C., recently returned to traveling a lot for work and is using the card to access airport lounges. He said

*Please turn to page B4*

INSIDE

## Netflix Expands Relationship With Shonda Rhimes





# 3-7. 好景気による短期労働市場の変貌

## Hourly Jobs Come With Signing Bonuses

7/2/2021 WST  
BY PATRICK THOMAS

Signing bonuses are usually reserved for professional athletes and a privileged few white-collar professionals. Not this summer.

As U.S. employers' search for hires increases in urgency—especially in the manufacturing, logistics, healthcare and food-service industries—truck drivers, hotel cleaners and warehouse workers are being offered signing bonuses

of hundreds and even thousands of dollars.

Nearly 20% of all jobs posted on job search site ZipRecruiter in June offer a signing bonus, up from 2% of jobs advertised on the job search site in March. The states with the highest shares of job listings that include a signing bonus are Iowa, Missouri, Vermont, Wyoming and Arkansas, according to ZipRecruiter labor economist Julia Pollak.

Hiring bonus offers start at \$500 and quickly rise from there. Job postings across sectors show that a \$1,000 hiring bonus is becoming table stakes in recruiting workers who make between \$16.50 and \$25 an hour. A \$1,000 hiring bonus is advertised on jobs listed for apartment-complex groundskeepers in Texas, movers in Florida, cabinet makers in Georgia, housekeepers in Wisconsin, pool cleaners in New Mexico and welders in Ohio,

among others.

"This is without a doubt the biggest change I've ever seen in mentions of a particular work perk," Ms. Pollak said.

Poultry processor Pilgrim's Pride Corp. is advertising a \$1,500 signing bonus for a production job that pays between \$13.55 to \$18.85 an hour in Gainesville, Ga. Thirty miles south in Bethlehem, Harrison Poultry Inc. is advertising similar jobs that pay up to \$20 an hour.

Please turn to page B2

### Bonuses Sweeten Hourly Jobs

Continued from page B1  
hour and come with a series of \$500 bonuses throughout the first year, totaling \$2,500. The companies didn't comment on the job listings.

A Burger King in Latrobe, Pa., put up a banner across its storefront advertising a \$1,500 hiring bonus for new employees and other signs advertising jobs open to 15-year-olds. Restaurant Brands International Inc., which owns the Burger King brand, didn't respond to requests for comment. An employee at the store said the hiring bonus was for salaried manager positions but declined to give more details.

A pest-control service specialist job in Charlotte, N.C., comes with a \$1,200 bonus. A

diesel mechanic job in Gulfport, Miss., advertises a \$1,500 bonus. A forklift operator job in Gainesville, Ga., with Kubota Manufacturing of America pays a \$2,000 bonus. The bonuses are used partly to get workers in the door and partly to keep them there.

Phil Sutton, a vice president with Kubota, says the \$2,000 hiring bonus—plus \$1,000 referral bonuses for staffers who recommend hires—have been the rival against federal unemployment benefits that have kept many workers on the sidelines through the spring. New workers get 25% of the signing bonus after their first 30 days, another 25% after 60 days and the rest after 90 as a way to keep them on, he adds.

"It gives us a leg up," he says. "It's been a great success in terms of recruiting."

Mr. Sutton says several other companies near him have launched \$1,000 bonuses, and radio commercials advertising Amazon.com Inc. warehouse jobs in the area pay hiring bonuses of \$1,000.

Amazon said in May that it

would hire 75,000 more U.S. workers, offering the \$1,000 perk. Amazon signing bonuses are up to \$3,000 for warehouse workers in certain locations, including Nashville, Tenn., and Greenwood Lake, N.Y., according to job postings. New employees also get an extra \$100 on their first day when they show proof of Covid-19 vaccinations.

Amazon said signing bonuses were standard recruiting practice for the online retail giant and that the amount depends on local market demand.

Cash signing bonuses are attractive to employers because they are a one-time cost and don't require raising wages for the long term or paying out greater benefits indefinitely, said Brad Hershebin, senior economist at the W.E. Upjohn Institute for Employment Research. The bonuses appeal to potential employees, especially new college graduates and lower-wage workers, who may need the cash, he added.

"Employers are looking at how they can sweeten the deal



In a competitive market for new hires, companies are using bonuses to enhance their appeal.

for workers and stand out," said AnnElizabeth Konkel, an economist at Indeed. The share of job seeker searches on the site for the word "bonus" has steadily climbed since mid-spring, she added.

In Orlando, Fla., Fernando Hernandez, 28 years old, had

been unemployed since last summer after the car dealership he was working for closed. While applying for jobs last month, he found a position at Cuba Libre Restaurant & Rum Bar with a \$1,000 signing bonus and another \$1,000 referral bonus, if the new hire

brought on other workers.

Mr. Hernandez said he has already referred friends for employment and earned an additional \$2,000, which will be spread out through multiple paychecks.

—Erich Schwartzel contributed to this article.



# 3-8. ワクチン接種効果明白に 2021年7月

Forbes

BREAKING | Jul 1, 2021, 03:29pm EDT | 103,545 views

## 99.5% Of People Killed By Covid In Last 6 Months Were Unvaccinated, Data Suggests



Jemima McEvoy Forbes Staff  
Business

I'm a British-born reporter covering breaking news for Forbes.

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**TOPLINE** CDC Director Dr. Rochelle Walensky said at a Thursday White House briefing that preliminary data reviewed by her agency suggests 99.5% of the people who died from Covid-19 over the past six months were unvaccinated, a stunning statistic in support of her assertion that nearly every virus-linked death is now preventable.



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## 99.5% of COVID-19 deaths in the US are now in unvaccinated people, CDC head says

Marianne Guenot Jul 9, 2021, 6:38 AM



Dr. Rochelle Walensky, the director of the Centers for Disease Control and Prevention. White House/YouTube

BREAKING | Jul 6, 2021, 03:40pm EDT | 16,126 views

## Maryland Says 100% Of June Covid Deaths Were Among The Unvaccinated, As Early Data Shows Similar Trend Nationally



Jemima McEvoy Forbes Staff  
Business

I'm a British-born reporter covering breaking news for Forbes.

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## 3-9.米国世論動向2021年：旅行・宿泊・外食

Would you favor or oppose businesses requiring people to show proof of coronavirus/COVID-19 vaccination in order to do the following over the next several months?

	Apr 2021	May 2021	Aug 2021
	%	%	%
<b>Travel by airplane</b>			
Favor	57	60	61
Oppose	43	40	39
<b>Stay in a hotel</b>			
Favor	44	48	53
Oppose	56	52	47
<b>Attend events with large crowds</b>			
Favor	55	54	58
Oppose	45	46	42
<b>Dine in a restaurant</b>			
Favor	40	44	53
Oppose	60	56	47
<b>Go to office or work site</b>			
Favor	N/A	N/A	56
Oppose	N/A	N/A	44

# 3-10.米国世論動向2021年：旅行・宿泊・外食

## Attitudes Toward Vaccination Requirements, by Political Identity and Vaccination Status

Would you favor or oppose businesses requiring people to show proof of coronavirus/COVID-19 vaccination in order to do the following over the next several months?

	Vaccinated Democrats	Unvaccinated Democrats	Vaccinated Independents	Unvaccinated Independents	Vaccinated Republicans	Unvaccinated Republicans
	%	%	%	%	%	%
<b>Travel by airplane</b>						
Favor	96	66	69	19	48	12
Oppose	4	34	31	81	52	88
<b>Stay in a hotel</b>						
Favor	87	56	58	17	39	9
Oppose	13	44	42	83	61	91
<b>Attend events with large crowds</b>						
Favor	94	63	66	19	42	9
Oppose	6	37	34	81	58	91
<b>Dine in a restaurant</b>						
Favor	88	62	55	17	35	9
Oppose	12	38	45	83	65	91
<b>Go to office or work site</b>						
Favor	92	63	59	17	38	10
Oppose	8	37	41	83	62	90

# 3-11. 「米国経済回復は何故早かったのか？」 → 日米で企業・経営者の態度が根本的に相違

## \*日米発想の相違：日本

新型コロナウイルスの影響で、県内の主要ホテルで臨時休業が相次いでいる。宿泊は政府や県の休業要請に含まれていないが、観光客の激減に県内での感染拡大が追い打ちに。利用客や従業員の安全確保が必要だと判断し、自主判断で休業に踏み切っている。背景には県の支援策が足りないとの不満もあり、ホテル関係者からは「県は判断が遅く、頼りにならない」と批判が上がる。

「宿泊事業者に対する補償などの明確な措置、方向性が示されておらず、苦情の声も聞かれる。県は休業補償などを含めさまざまな対策を講じてほしい」

「県からはまだ基準が示されておらず、何も決められない。方針を早く示してほしい」

⇒「政府の指導に従って休業するが、（市長・県知事・首相は）再開時期や具体的な新オペレーション案を明示してくれ。」（政府任せ）

## \*日米発想の相違：米国

「政府の緊急命令に従って休業するが、各産業界はそのまま座して死を待つ（現預金消滅、与信枠も一杯で破産）よりは、再感染拡大リスクを取っても、業務再開したいので、そのリスクを業界に取らせてくれ。当然我々産業界で調整相談し、協調して段階的再開案を作る。」

首長「ならば、民間経済再開委員会を作って、広く産業界と医療機関も含めて任命するから、再開案作成してくれ。内容が妥当ならばそれに従って実行してみよう。でも再感染したら再度閉鎖するリスクがあるから慎重に。自宅待機賛成派が安心して往訪してみる気になるような目に見えるCOVID-19対策を実施してくれ」

⇒産業界が広く協調して委員会で自ら再開案を作成。首長が委員会案を承認・実施する際には産業界の全面的賛同が得られる。故に対応が早く、各産業の詳細が詰められている。





# 3-12. オーランド（オレンジ郡）経済復興委員会、総計50名

AdventHealth, Scott Brady, MD, Senior Vice President of Ambulatory Services 大手病院専務  
Alfond Inn, Jesse Martinez, General Manager 独立系ホテルGM  
Black Business Investment Fund (BBIF), Inez Long, President and CEO 投資会社社長  
CareerSource Central Florida Pamela Nabors, President and CEO 人材派遣会社  
Central Florida Auto Dealers Association, Evelyn Cardenas, CEO 自動車販売業協会  
Church Street Entertainment, Doug Taylor, Managing Partner エンターテインメント会社  
City of Orlando & Orlando Venues, Allen Johnson, Chief Venues Officer オーランド商業団体  
Curley & Pynn Public Relations, Dan Ward, President 広告会社  
Darden Restaurants, Dave George, EVP and Chief Operating Officer 大手レストランチェーン会社  
Don Julio's Mexican Kitchen, Florencio "Larry" Rodriguez, Owner 独立レストランオーナー  
Dr. Phillips Center for the Performing Arts, Kathy Ramsberger, President & CEO 劇場社長  
Florida Department of Health in Orange County, Raul Pino, MD, Director フロリダ州衛生局部長  
Florida Restaurant & Lodging Association, Keri Burns, Central Florida Regional Director レストラン協会  
Highwoods Properties, Steve Garrity, Vice President 不動産屋  
Hyatt Regency, Brian Combs, Vice President ハイヤットホテルVP  
J Henry's Barber Shop, John Henry, Owner ヘンリーの床屋、オーナー（写真添付）  
John Michael Exquisite Weddings & Catering, Michael Thomas, Owner ウエディングとケータリング会社  
Johnny Rivers Grill & Market, Johnny Rivers, Owner 独立レストランオーナー  
Kissimmee/Osceola County Chamber of Commerce, John Newstreet, President/CEO 商工会議所  
Lake County Agency for Economic Prosperity, Brandon Matulka, Executive Director レイク郡経済開発局  
C. Spa & Nail Spa, Mary Chau, Founder and CEO ネイルサロンオーナー  
Merlin Entertainment, Adrian Jones, Global New Concepts Development Director 英国系大手娯楽会社  
Mosaic Hair Studio, Mike Van den Abbeel, Salon Owner ヘアサロンオーナー  
National Entrepreneur Center, Jerry Ross, Executive Director 起業家センター  
Nelson, Mullins/Broad and Cassel, Wayne Rich, Of Council 地元政府系か  
Orange County Public Schools, Barbara Jenkins, Ed.D, Superintendent オレンジ郡教育局  
Orlando City Soccer Club, Alex Leitao, CEO オーランドサッカークラブ社長  
Orlando Health, George Ralls, MD, Medical Chief Quality Officer 地元大手病院  
Orlando International Airport, Phil Brown, CEO オーランド国際空港社長  
Orlando Magic, Alex Martins, CEO オーランドマジックバスケットボール社長  
Orlando Shakespeare Theater, Douglas Love-Ramos, President 劇場社長  
Prospera, Augusto Sanabria, President and CEO スペイン語系の起業家  
Rejoice in the Lord Ministries & President, African American Council of Christian Clergy, Pastor Roderick Zak, CEO 黒人教会社長  
Rosen Shingle Creek, Dan Giordano, General Manager 大手独立系ホテルGM  
SeaWorld Parks & Entertainment, Brad Gilmour, Vice President of Operations 大手テーマパーク幹部  
Seminole County Government, Tricia Johnson, Deputy County Manager/Chief Administrator for Community Relations and Economic Development セミノール郡経済開発局  
The Mall at Millennia, Steve Jamieson, General Manager 現地大手ショッピングモール  
The Trentham Santiago Group, Conrad Santiago, CFP®, MSFS, Private Wealth Advisor 富裕層投資顧問  
The Vineyard Wine Bar & Healthy Bistro, Deborah Linden, Owner ワインバーオーナー  
Truist, Sandy Hostetter, Central Florida Regional President 地元金融機関  
UCF Rosen College of Hospitality Management, Youcheng Wang, Ph.D., Dean 教育  
Unicorp National Development, Chuck Whittall, President 不動産開発業者  
United Safety Council, Chris Earl, Director 運転教習所  
Universal Orlando, Rich Costales, Executive Vice President of Resort Operations 大手テーマパーク  
VMD Ventures, LLC, Harold Mills, CEO IT系会社  
Walmart, Inc., Monesia Brown, Director of Public Affairs and Government Relations 大手スーパーマーケットチェーン  
Walt Disney World Resort, Thomas Mazloum, Senior Vice President, Resort & Transportation Operations 大手テーマパーク  
WaWa, Inc., Todd Souders, Senior Director Florida Operations and New Market Development 大手ガソリンスタンドチェーン会社  
Wyndham Destinations, Frank Goeckel, Senior Vice President, Strategy, Integration, and Acquisitions ホテル、タイムシェア開発保有運営会社  
YMCA of Central Florida, Dan Wilcox, President & CEO スポーツクラブ会社



# 第4章：日本&沖縄観光需要急復興戦略案





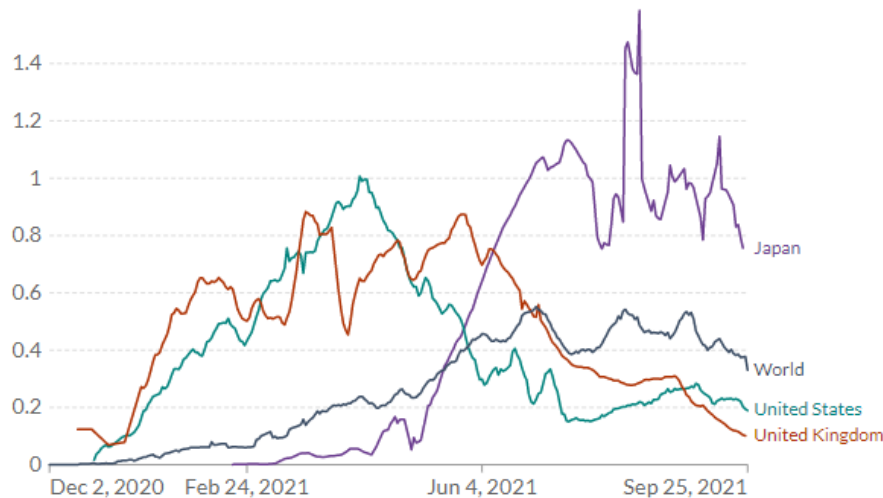
# 4-2. 観光産業復興は近い未来である証拠

Daily COVID-19 vaccine doses administered per 100 people

Shown is the rolling 7-day average per 100 people in the total population. For vaccines that require multiple doses, each individual dose is counted.

Our World in Data

LINEAR LOG + Add country



Source: Official data collated by Our World in Data - Last updated 26 September 2021, 12:00 (London time)  
OurWorldInData.org/coronavirus • CC BY

Dec 2, 2020 Sep 25, 2021

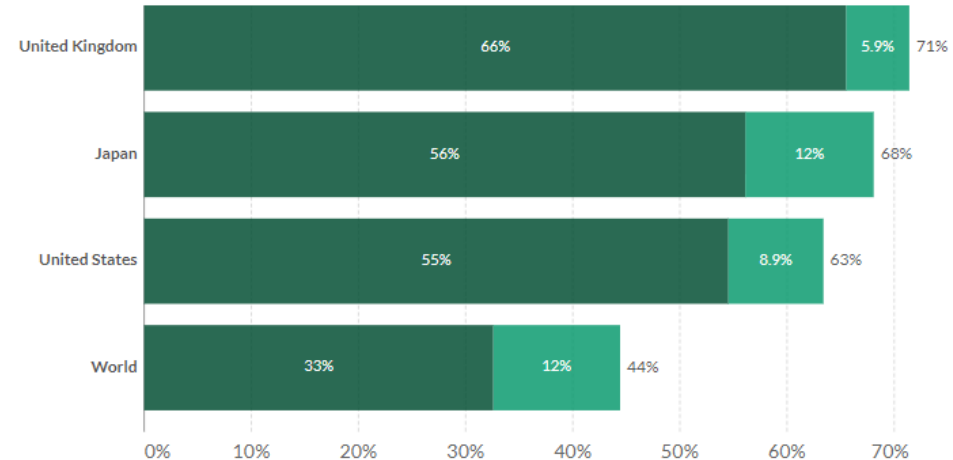
Share of people vaccinated against COVID-19, Sep 25, 2021

Alternative definitions of a full vaccination, e.g. having been infected with SARS-CoV-2 and having 1 dose of a 2-dose protocol, are ignored to maximize comparability between countries.

Our World in Data

+ Add country

Share of people fully vaccinated against COVID-19 Share of people only partly vaccinated against COVID-19



Source: Official data collated by Our World in Data. This data is only available for countries which report the breakdown of doses administered by first and second doses in absolute numbers.

CC BY

Dec 27, 2020 Sep 25, 2021

- 欧米諸国に4~5カ月遅れたが、6月頃から接種スピード急上昇し(左図)、米国を抜き、近いうちに英国の接種率をも超越する勢い(右図)。



# 4-3.観光産業復興は近い未来である証拠

Source: Vaccinations data from local governments via Our World in Data.

## Vaccinations by country

Search countries

	Doses administered		Pct. of population	
	▼ Per 100 people	Total	Vaccinated	Fully vaccinated
World	80	6,111,080,156	-	-
U.K.	140	93,392,830	73%	67%
Italy	139	83,857,158	74%	67%
Maldives	137	724,971	74%	63%
Mongolia	136	4,376,377	70%	66%
Finland	136	7,490,200	75%	61%
Sweden	132	13,607,052	69%	63%
Malaysia	132	42,106,397	71%	61%
Mauritius	129	1,633,952	67%	62%
Turkey	129	107,641,923	64%	52%
Germany	129	106,863,393	68%	64%
Netherlands	128	22,272,373	70%	63%
Luxembourg	125	777,789	67%	64%
Japan	124	156,559,895	68%	56%
Austria	121	10,781,434	64%	61%
Saudi Arabia	121	41,490,683	68%	53%
Panama	121	5,122,694	69%	52%
Lithuania	120	3,339,375	62%	58%
Switzerland	120	10,266,591	64%	55%
Curaçao	119	186,793	62%	57%
Ecuador	118	20,571,335	64%	57%
Sri Lanka	118	25,813,491	66%	53%
United States	117	388,567,109	64%	55%

日本のワクチン接種率は過去1~2カ月に急上昇。人口100名あたりのワクチン接種数が100超えのいわばエリート組(世界平均は80。9/25/2021現在)。

静かに米国の接種率を上回り、英国に近づく時期に近いほど急上昇している。

[Covid World Vaccination Tracker - The New York Times \(nytimes.com\)](https://www.nytimes.com/interactive/2021/09/25/world/covid-vaccinations.html)

国内観光復興&インバウンドもワクチンパスポート制度で復興できる時期に近い。

(だが観光産業復興戦略がしっかりあるかは別問題)

## 4-4.世界各国との相対感乖離に注意要

米国・フロリダ州・日本のCOVID-19被害状況比較 2021年9月26日

		USA	Florida	日本
1	人口	333,394,863	21,477,737	126,015,630
2	総感染者数	43,750,920	3,591,878	1,692,387
3	総死者数	706,313	53,124	17,453
4	百万人あたり感染者数	131,229	167,237	13,432
5	百万人あたり死者数	2,119	2,473	139

Source: made by T. Hara based data from Worldometers.info as of 9/26/2021

ワクチン接種率だけでなく、被害状況を見ても実は日本は客観的に卓越した成績。感染データ側を俯瞰しても前向きな経済政策を取れる状況にある。日本語報道が「日本は酷い」と必要以上に貶めていたのが世界データで明白。あとは、経済復興を仕掛ける2要素（**ワクチン接種率向上** & **個人給付金**）を加えれば**米国同様の観光経済急復興政策**が可能。

# 4-5.観光産業復興戦略案策定の時期

## 観光産業復興ロードマップ

将来	50%達成時	一日あたり死亡者数(前日7日間データによる一日平均死亡者数)に <b>変更</b>	非常事態宣言対象地域以外への都道府県境界を超えた旅行自由化	G7のワクチン接種済者に限り、出国前3日以内のPCR陰性証明持参し、日本到着時入国前陰性検査を条件に自主隔離義務免除
将来	60%達成時	一日あたり死亡者数(前日7日間データによる一日平均死亡者数)	非常事態宣言対象地域以外への都道府県境界を超えた旅行自由化。 <b>国内旅行観光産業への需要側刺激策（例：Goto類似）の開始</b>	G7諸国に加えて、欧米諸国にて認可済ワクチン接種済証明を持つワクチン接種完了者が <b>70%</b> を超える諸国居住者に限り、出国前3日以内のPCR陰性証明持参し、日本到着時入国前陰性検査を条件に自主隔離義務免除
将来	70%達成時	一日あたり死亡者数(前日7日間データによる一日平均死亡者数)	非常事態宣言対象地域以外への都道府県境界を超えた旅行自由化。国内旅行向け需要刺激策継続& <b>インバウンド層向け訪日奨励制度開始</b>	G7諸国に加えて、欧米諸国にて認可済ワクチン接種済証明を持つワクチン接種完了者が <b>60%</b> を超える諸国居住者に限り、出国前3日以内のPCR陰性証明持参し、日本到着時入国前陰性検査を条件に自主隔離義務免除
将来	80%達成時	一日あたり死亡者数(前日7日間データによる一日平均死亡者数)	都道府県境界を超えた旅行自由化。上記国内&インバウンド層向け刺激策継続。 <b>観光産業復興宣言実施。</b>	G7諸国に加えて、欧米諸国にて認可済ワクチン接種済証明を持つワクチン接種完了者が <b>50%</b> を超える諸国居住者に限り、出国前3日以内のPCR陰性証明持参し、日本到着時入国前陰性検査を条件に自主隔離義務免除。 <b>Sinovac、SputnikV等の欧米諸国認可ワクチン以外のワクチン接種者受入については、他のG7諸国動向を踏まえ足並み揃えて順次入国条件緩和を検討。</b>



# 第5章. マクロ外的環境把握：より広い公共政策問題 確認と産業としての観光を活用した改善策の提案

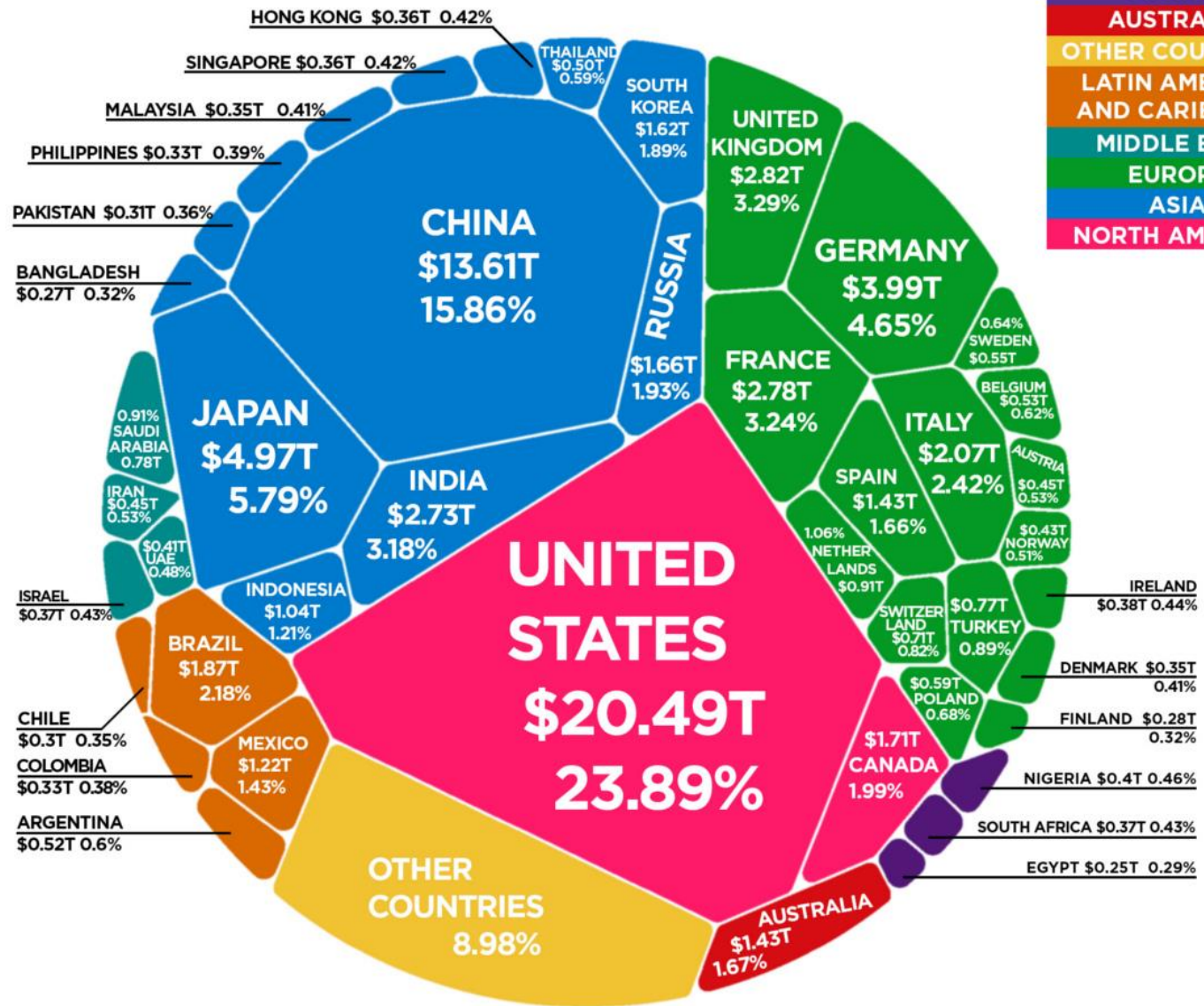


## 戦略案策定の3ステップ

1. 現状把握
2. 理想像設定
3. 現状から理想像到達の期間設定

## 5-2: 日本についての戦略論：世界各国GDP規模比較

World's Region



### Article & Sources:

<https://howmuch.net/articles/the-world-economy-2018>

<https://databank.worldbank.org>

howmuch.net

米国(US\$20.5兆)

USA \$20.5 Trillion

中国(US\$15.7兆)

China \$13.6 Trillion

に続いて

日本は世界第三位

(US\$5兆=約500兆円)

Japan \$5.0 Trillion, 3<sup>rd</sup>

largest in terms of

GDP size.



# 5-3: 一人当たりGDP(2018年)

## World GDP Per Capita (GDP PC) Rankings [1/3]

GDP per capita in current prices (US dollars per capita) during 2018

Rank	Country	GDP PC	Rank	Country	GDP PC	Rank	Country	GDP PC
1	Luxembourg	114,234	23	Israel	41,644	45	Slovak Republic	19,582
2	Switzerland	82,950	24	New Zealand	41,267	46	Oman	19,302
3	Macao SAR	82,388	25	United Arab Emirates	40,711	47	Lithuania	19,143
4	Norway	81,695	26	Japan	39,306	48	St. Kitts and Nevis	18,203
5	Ireland	76,099	27	Italy	34,260	49	Latvia	18,032
6	Iceland	74,278	28	The Bahamas	34,003	50	Barbados	17,961
7	Qatar	70,780	29	Brunei Darussalam	32,414	51	Antigua and Barbuda	17,636
8	Singapore	64,041	30	Puerto Rico	31,939	52	Uruguay	17,165
9	United States	62,606	31	Korea	31,346	53	Seychelles	16,472
10	Denmark	60,692	32	Malta	31,058	54	Trinidad and Tobago	16,223
11	Australia	56,352	33	Kuwait	30,839	55	Palau	16,091
12	Sweden	53,873	34	Spain	30,697	56	Chile	16,079
13	Netherlands	53,106	35	Cyprus	28,340	57	Hungary	15,924
14	Austria	51,509	36	Slovenia	26,234	58	Panama	15,679
15	Finland	49,845	37	Bahrain	25,851	59	Poland	15,431
16	San Marino	48,946	38	Aruba	25,466	60	Croatia	14,816
17	Hong Kong SAR	48,517	39	Taiwan Province of China	24,971	61	Maldives	14,501
18	Germany	48,264	40	Saudi Arabia	23,566	62	Romania	12,285
19	Belgium	46,724	41	Portugal	23,186	63	Costa Rica	11,744
20	Canada	46,261	42	Estonia	22,990	64	Argentina	11,627
21	France	42,878	43	Czech Republic	22,850	65	Russia	11,327
22	United Kingdom	42,558	44	Greece	20,408	66	Mauritius	11,281



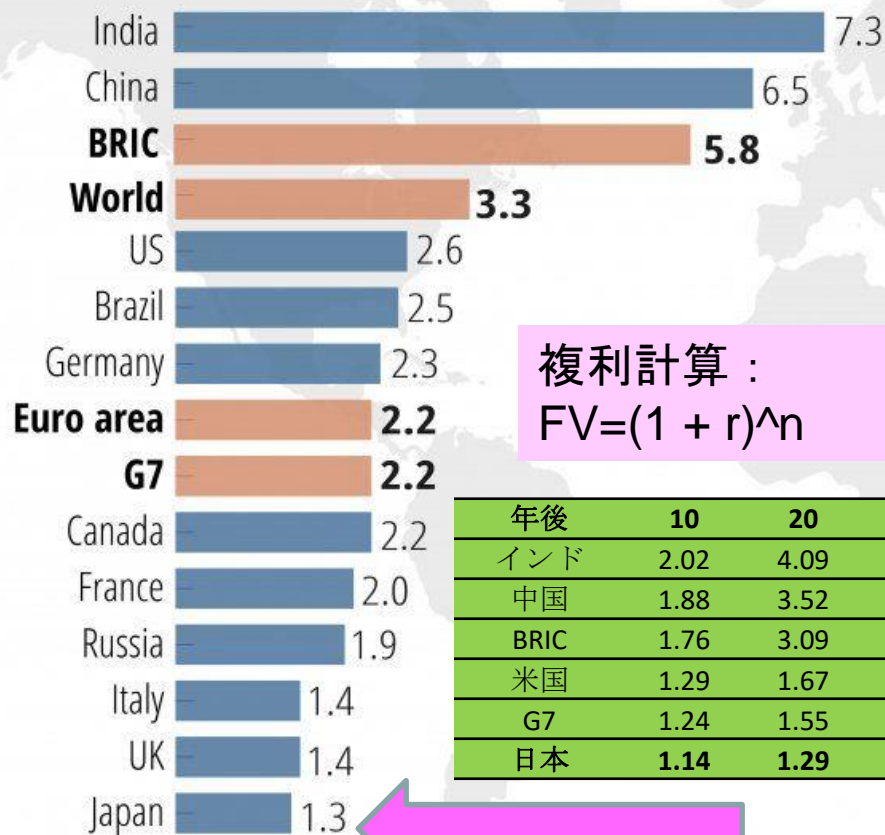
# 5-4: 世界主要国経済成長率比較(2018)

## GLOBAL ECONOMIC OUTLOOK

Analysts are upbeat on global economy thanks to strong fundamentals

### 2018 GDP Growth Forecasts

Annual Variation in %



複利計算：  
 $FV = (1 + r)^n$

年後	10	20	30
インド	2.02	4.09	8.28
中国	1.88	3.52	6.61
BRIC	1.76	3.09	5.43
米国	1.29	1.67	2.16
G7	1.24	1.55	1.92
日本	1.14	1.29	1.47

■ Global growth is expected to remain strong this year, and risks to the economic forecast for 2018 are skewed to the upside.

■ Loose monetary conditions are supporting consumer confidence and capital expenditure.

Solid global economic dynamics are tightening job markets, which is reverberating positively in household spending.

**FOCUSECONOMICS**

FocusEconomics Consensus Forecast Major Economies - February 2018 edition

## 5-5. 外的経営環境

# 2018全体像俯瞰 Trade Overview 2018

Total Export 2018 \$814B

輸出総額 81兆4,788億円

自動車	15.1%
半導体等電子部品	5.1%
自動車の部分品	4.9%
鉄鋼	4.2%
原動機	3.6%
半導体等製造装置	3.3%
プラスチック	3.1%
科学光学機器	2.8%
電気回路等の機器	2.6%
有機化合物	2.5%

日本GDP500兆円、政府の一般予算：約100兆円  
**GDP \$5Trillion, Government Budget \$1Trillion**  
**インバウンド客観光消費額は外貨獲得の輸出産業**  
**Economic Effect of Inbound visitors' expenditure is similar to those of export sectors (See Left)**  
**「4.8兆円(\$48B 2019)、8兆円(\$80B 2020)、15兆円(\$150B 2030)」とは？ 輸出入産業額と相対比較。Let's put these in perspective with annual trade balances.**

### EXPORT ITEMS

自動車automobile12.1兆円(\$120B)、**原油crude oil** 8.9兆円(\$89B)  
 半導体semiconductor 4.2兆円(\$42B) **LNG** 4.7兆円(\$47B)  
 自動車部品auto-parts 3.9兆円(\$39B) **衣類clothes**3.3兆円(\$33B)  
 鉄鋼Steel 3.4兆円(\$34B) **通信機(telecomm)**3.0兆円(\$30B)  
 原動機motors2.9兆円(\$29B) **医薬品(pharmaceuticals)** 2.9兆円(\$29B)

### IMPORT ITEMS

国内観光客は国内での**富の移転**。一方、インバウンド客は、**外貨獲得による国富増大**。  
**経済効果が決定的に異なる。**

Expenditures by Inbound visitors generate positive impacts on balance of payments, while those by domestic tourists cause only transfer of wealth within Japan.

生糸が主要輸出品目だった明治時代に、箱根・日光・雲仙に外貨獲得の為グランドホテルを創り上げた初心に回帰すべし。

Be reminded of the initial goal of "Grand Hotels" at Nikko, Hakone, Unzen for Meiji government to earn precious foreign currency.

Total Import 2018 \$827B

輸入総額 82兆7,033億円

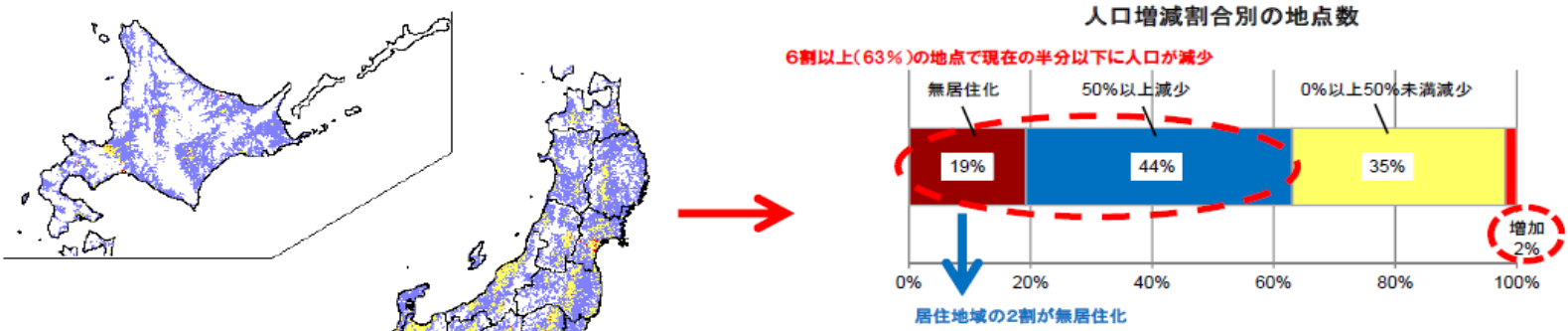
原油および粗油	10.8%
LNG (液化天然ガス)	5.7%
衣類および同付属品	4.0%
通信機	3.7%
医薬品	3.6%
半導体等電子部品	3.4%
石炭	3.4%
石油製品	2.5%
電算機類 (含周辺機器)	2.5%
非鉄金属	2.4%

# 5-6: 国家課題と解決方向性 Challenges & Strategic Responses

## 国土全体での人口の低密度化と地域的偏在が同時に進行(2010年→2050年) 国土交通省

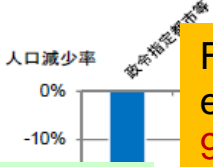
- 全国を《1km<sup>2</sup>毎の地点》でみると、人口が半分以下になる地点が現在の居住地域の6割以上を占める(※現在の居住地域は国土の約5割)。
- 人口が増加する地点の割合は約2%であり、主に大都市圏に分布している。
- 《市区町村の人口規模別》にみると、人口規模が小さくなるにつれて人口減少率が高くなる傾向が見られる。特に、現在人口1万人未満の市区町村ではおよそ半分に減少する。

【2010年を100とした場合の2050年の人口増減状況】



凡例:2010年比での割合  
Blue: 50%以上減少(無居住化含む)  
Yellow: 0%以上50%未満減少  
Red: 増加

市区町村の人口規模別の人口減少率



**[How to View the Population Map 2010→2050]**  
Blue: more than 50% decrease in population  
Yellow: Decrease expected but less than 50%  
Red: Population Increase expected

**Important: how to vitalize the regional economies in blue area!?**

Source: MLIT PDF: <http://www.mlit.go.jp/common/001033672.pdf>

From 2010 to 2050, population is expected to decrease from 127M to 90~100M range, while inbound visitors are aimed to increase from current 30M to 40M (\$48B to \$80B) in the next 10 years. → Labor shortage = time for Japan to think about utilization of (1) short-term labor (2) immigration of skilled (and unskilled) workers (3) subsequently, cross cultural management.



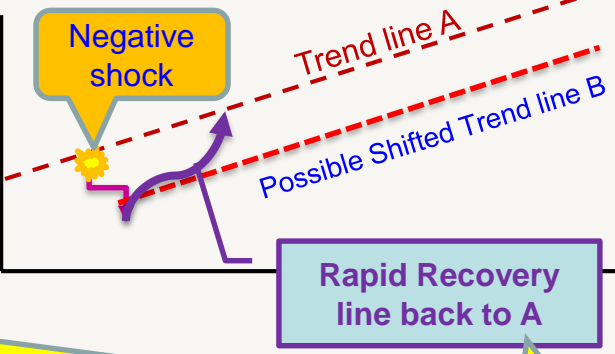


# 5-7 : 沈みゆく日本?→インバウンド産業で再び旭日

原因が分かれば、対処方法はある。

複利計算 :  
 $FV = (1 + r)^n$

年後	10	20	30
インド	2.02	4.09	8.28
中国	1.88	3.52	6.61
BRIC	1.76	3.09	5.43
米国	1.29	1.67	2.16
G7	1.24	1.55	1.92
日本	1.14	1.29	1.47



理想像 : これが実現するとどういう日本の地域経済になっているだろうか?

Year	総消費額(兆円)	年次成長率
2019	4.8	10.00%
2020	5.8	10.00%
2021	6.4	10.00%
2022	7	10.00%
2023	7.7	10.00%
2024	8.5	10.00%
2025	9.4	10.00%
2026	10.3	10.00%
2027	11.3	10.00%
2028	12.4	10.00%
2029	13.7	10.00%
2030	15.1	10.00%
2031	15.8	5.20%
2032	16.7	5.20%
2033	17.5	5.20%
2034	18.5	5.20%
2035	19.4	5.20%
2036	20.4	5.20%
2037	21.5	5.20%
2038	22.6	5.20%
2039	23.8	5.20%
2040	25	5.20%

Year	総消費額(兆円)	年次成長率
2019	4.8	10.00%
2020	0.7	--
2021	0.95	35.95%
2022	1.29	35.95%
2023	1.76	35.95%
2024	2.39	35.95%
2025	3.25	35.95%
2026	4.42	35.95%
2027	6.01	35.95%
2028	8.17	35.95%
2029	11.10	35.95%
2030	15.10	35.95%
2031	15.8	5.20%
2032	16.7	5.20%
2033	17.5	5.20%
2034	18.5	5.20%
2035	19.4	5.20%
2036	20.4	5.20%
2037	21.5	5.20%
2038	22.6	5.20%
2039	23.8	5.20%
2040	25	5.20%

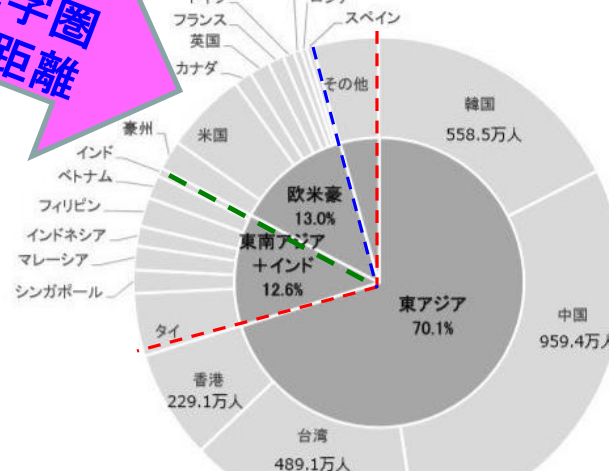
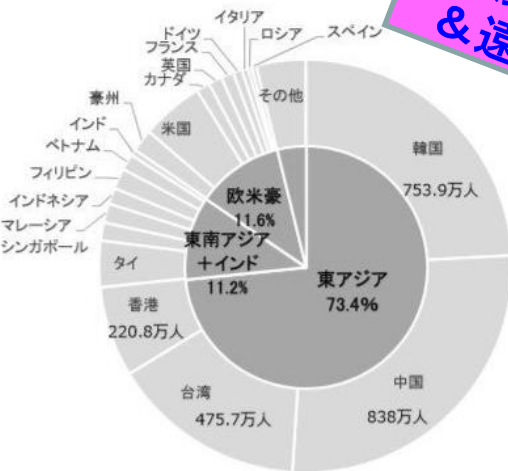
# 訪日外客数のシェアの比較 2018年/2019年

2018年1月～12月  
3119万2千人

2.2%増

2019年1月～12月  
3188万2千人

非漢字圏  
& 遠距離



[2019 data] Out of 31.8 million inbound visitors, East Asians account for 70.1%, SE Asian 12.6%, Europe+America+Australia 13.0% with average expenditures of \$1,500 per person.

## 5-8:インバウンド層誘致による 輸出・外貨獲得の国家戦略案 Possible National Strategy for Inbound Tourism Development

### Inbound 2.0.戦略イメージ表

- 観光消費額一人当たり15万円 X 31.8百万人 = 4.8兆円 (1)
- 観光消費額一人当たり20万円 X 40百万人 = 8.0兆円 (2)
- 観光消費額一人当たり25万円 X 60百万人 = 15.0兆円 (3)
- 観光消費額一人当たり30万円 X 50百万人 = 15.0兆円 (4)
- 観光消費額一人当たり30万円 X 80百万人 = 24.0兆円 (5)

2019年ラグビーワールドカップ経済効果：「経済効果を押し上げた海外からの観戦客は24万2000人で、欧州が54%を占め、オセアニア22%、アジア9%、北米7%と続いた。ラグビーW杯は試合間隔が長いため大会日程も44日間と長期にわたり、滞在日数は平均17日間、消費額は1人当たり68万6000円に上った。訪れた都道府県は平均4.8で、外国人観光客全体の平均2.5を上回り、国内を広範囲に移動したことがうかがわれる。」

RWC 2019: Average duration of stay was 17 days, total expenditures per person amounted to \$6,800. Out of 242,000 visitors, Europeans 54%, Oceania 22%, Asia 9%, North America 7%.

# 5-9. 日本が抱える問題提起と皆様が貢献可能な改善策提案

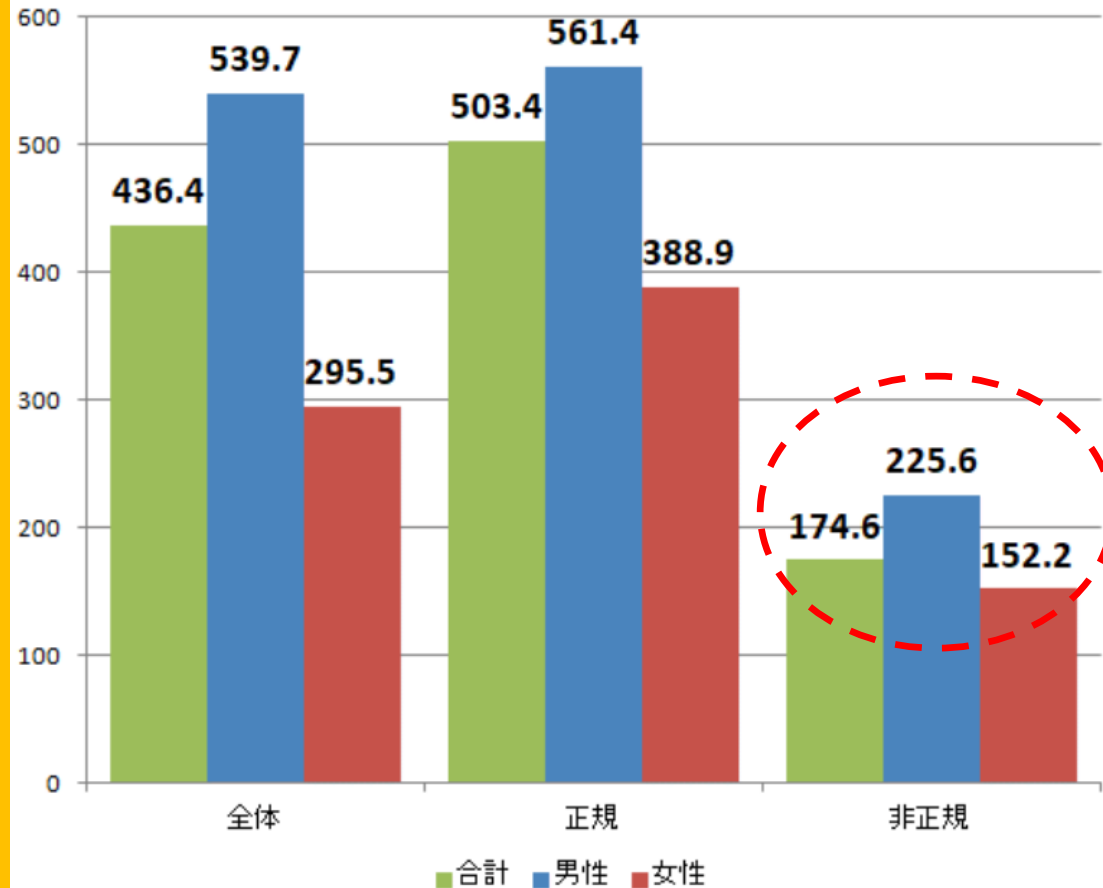
## 日本が直面する問題

1. 少子化高齢化による人口減・地方税収減
2. 子供を育てる経済的余力の無い層の存在(→少子化原因)
3. 経済成長率G7平均以下、世界平均以下による一人当たりGDPと年収の停滞
4. 輸出産業競争力低下による外貨獲得能力低下、一方で原油・ガスの輸入は継続

\*\*\*\*\*

- 2019年総雇用者数は5660万人、うち非正規雇用者2165万人（38%）。
- 富裕層（純資産1億円以上）126万世帯、全世帯数5372万世帯の2.3%。
- 世帯あたり人数＝2.34人
- 富裕層294万人が100万円消費するとxxxx億円VS非正規雇用者2165万人が20万円消費するとxxxx億円

1年を通じて勤務した給与所得者の1人あたりの平均給与  
(雇用形態別・男女別、万円)(2019年)



↑ 1年を通じて勤務した給与所得者の1人あたりの平均給与(雇用形態別・男女別、万円)(2019年)

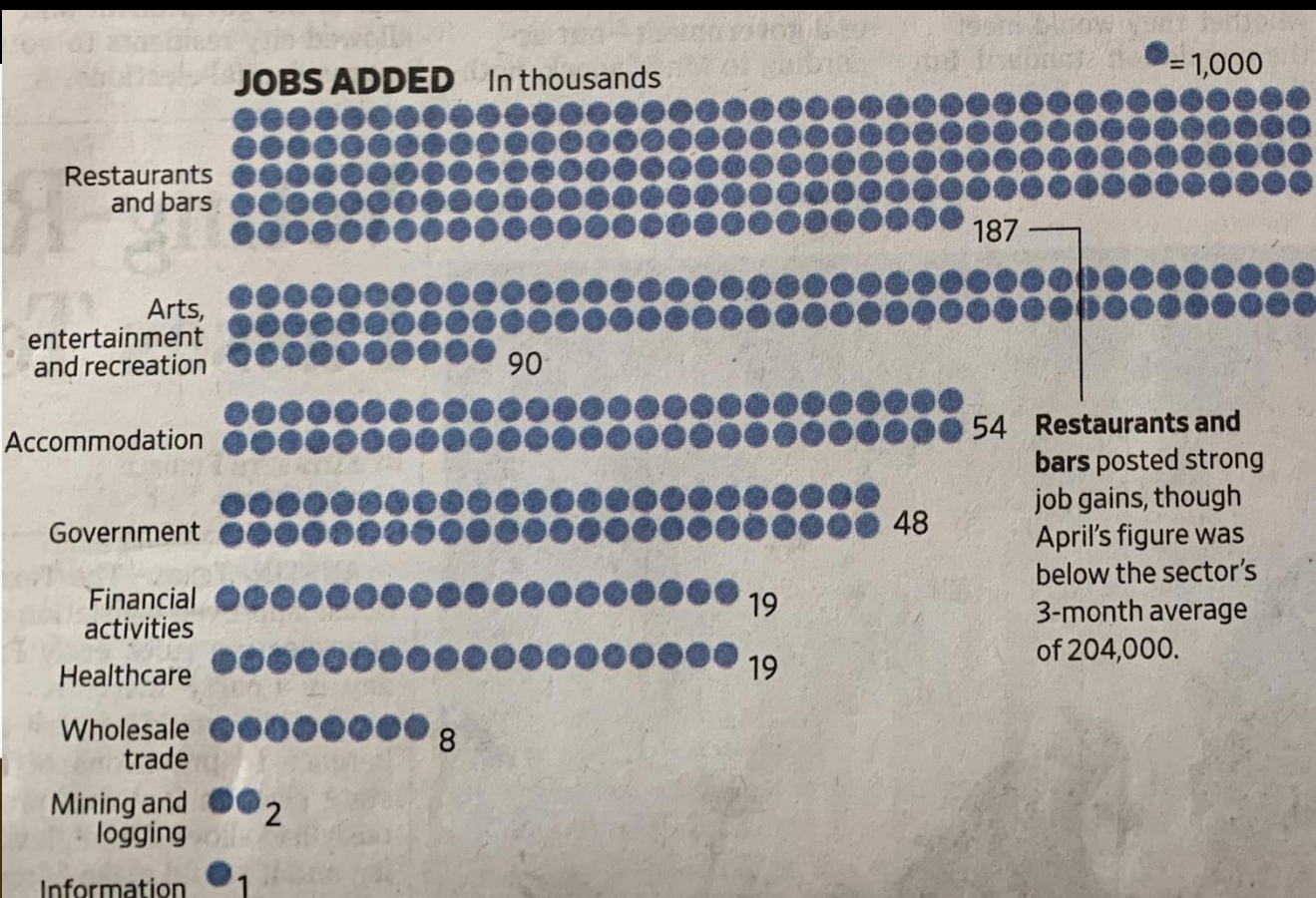


# 5-10.米国事例に学ぶ、日本観光業復興戦略案

(1) 個人給付金により本当に厳しい人々には即支出援助効果確保し多数国民には将来の不確実性への準備金として貯蓄増と借金軽減に蓄積させる。

(2) 高齢者からのワクチン接種を淡々と継続→将来の不安減少＝準備金必要性減少→復讐(復興)消費急復興を誘発

(3) 最も被害を受けた外食、芸術エンターテインメント、宿泊産業に需要急復興



Source: WSJ 5/8/2021

# 5-11.米国事例に学ぶ、日本観光業復興戦略案

- (1) 個人給付金により本当に厳しい人々には即支出援助効果確保し多数国民には将来の不確実性への準備金として貯蓄増と借金軽減に蓄積させる。
- (2) 高齢者からのワクチン接種を淡々と継続→将来の不安減少＝準備金必要性減少→復讐(復興)消費急復興を誘発
- (3) 最も被害を受けた外食、芸術エンターテインメント、宿泊産業に需要急復興

## 副作用：(嬉しい誤算)

1. 生き延びるのに精一杯で人員削減していた外食、芸術エンターテインメント、宿泊産業で**突如労働力不足**
2. 市場の需給関係の歪みで**労働者時給急騰** (\$15~17, + サイニングボーナス)
3. →**経営者にとっては危機に見えるが、中長期的に俯瞰すれば、**
  1. 「**労働力不足**」の美辞麗句に隠れた「**職種の魅力不足問題**」を構造的に転換出来る**30年に一度の機会**
  2. 過去20年強、誰も崩壊出来なかった「**デフレ経済構造**」を観光産業主導で**創造的破壊**ができる**機会**
  3. 日本&沖縄の隠れた社会問題である**低賃金低可処分所得層(非正規・女性)**を一気に引き上げる社会構造変革への**数十年に一度の機会**

# 5-12. 問題提起と改善策の提案

\*\*\*\*\*

- 2019年総雇用者数は5660万人、うち非正規雇用者2165万人（38%）。
- 富裕層（純資産1億円以上）126万世帯、全世帯数5372万世帯の2.3%。
- 世帯あたり人数=2.34人
- 富裕層294万人が100万円消費すると 2,940億円
- 非正規雇用者2165万人が20万円消費すると 4,330億円

## 1. 如何に非正規雇用者の年収を上げるか？

1. 継続教育・オンライン教育インフラ構築必須
2. 産業界から需要がある、高給に直結するスキル(ホスピタリティ経営) 教育

## 2. 如何に地方出身者を地元で雇用するか？

1. 労働条件の飛躍的改善による人材流出阻止&人材流入の実現
2. 収益力向上に寄与する特殊スキルに潤沢な手当支給（英検1級、TOEFL、中韓ロシア語）

## 3. 如何に子育て世代全体の年収を上げるか(特に非正規女性)？

1. 上記 1－1, 1－2
2. 継続教育に対して、履修完了時に補助金給付（市区町村&民間企業ベース）

## 4. 如何に地方在住就労者の知識・スキル向上を体系的に実施するか？

1. 上記 1－1, 1－2、3－2
2. ホスピタリティ経営の人材育成センターとして中間管理・経営層の人材育成県となり、送金収入が期待出来る



# 5-13. 問題提起と改善策の提案

## Income Statement (I/S), or Profit and Loss Statement (P/L)

Hotel Example

<b>Gross Revenue</b>	100
Dept. Expenses	39
<b>Dept. Operating Profit</b>	<b>61</b>
<b>Undist. Op. Expenses</b>	<b>23</b>
<b>Income Before Fixed Charges</b>	<b>38</b>
Mgt Fee	3
Interest	
Insurance	1
Prop. Tax	2
Depreciation	
<b>Income before Income tax</b>	<b>31</b>
Income Tax	7
<b>Net Income</b>	<b>24</b>

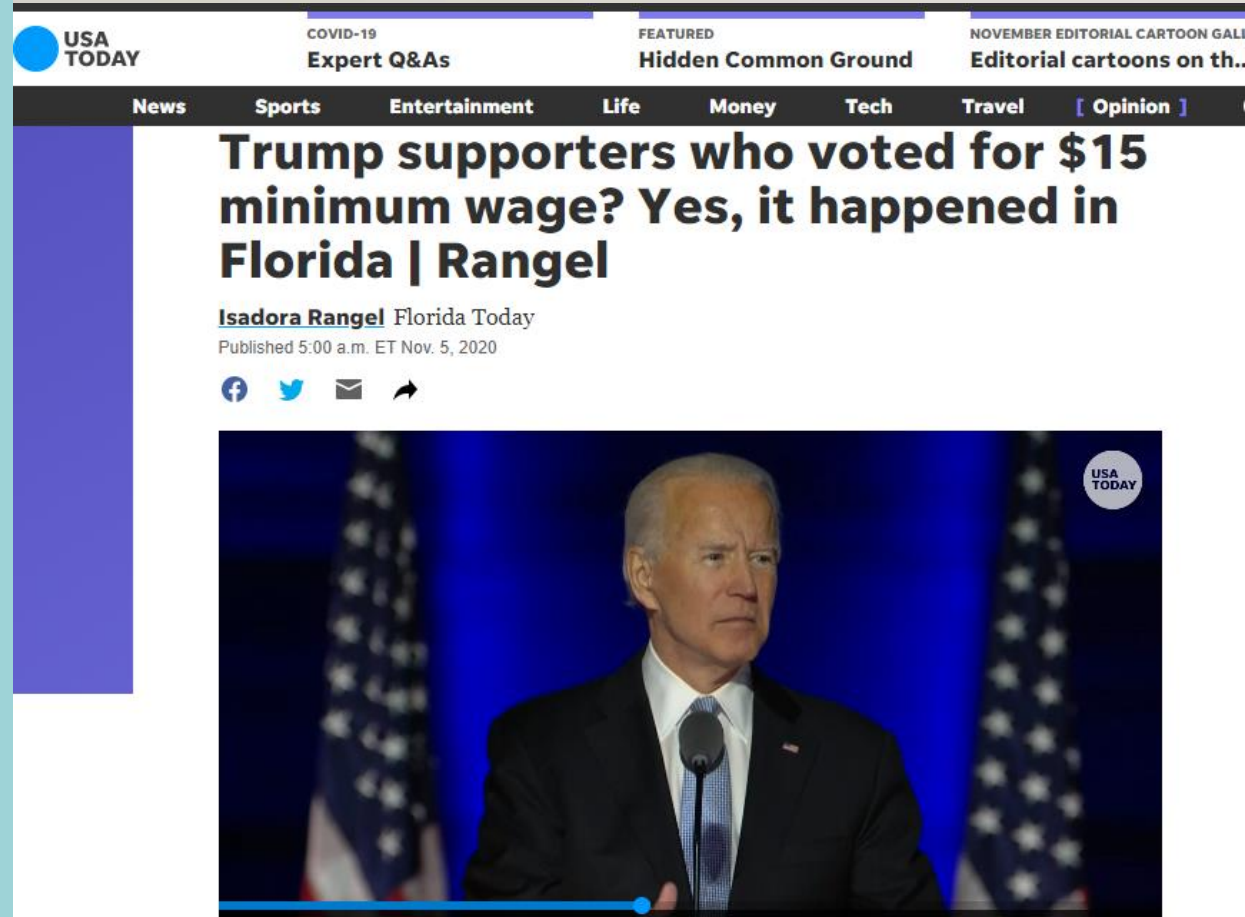
1. インバウンド客は9割以上はFIT (free independent traveler)
2. 伝統的には日本人団体送客という昭和のビジネスモデルは旅行代理店に**15~17%前後**を支払っていた。→FITインバウンド客はこれが不要に→当期利益増(配当or内部留保)にするか、又は**従業員の待遇改善原資**となり得る。
3. 英語で業務可能な従業員に特別手当配給。(英検、TOEFL/IELTSスコアで客観的に判断)
4. 地方都市では、英語の出来る高校生は都会の大学に進学して帰ってこない→**インバウンド客対応の為、英語出来る人材に特別手当払う原資確保**。
5. 女性非正規雇用者の年収3百万円を狙う。**Fair Tradeの発想: *We are proud to share with our guests that our employees are all paid fair wages to sustain quality of life in our community*** 需要側で発想に共感しプレミアムを払う消費者が居れば持続出来る。**現状の低学歴者雇用先というイメージ改善**に産業界がリーダーシップとる機会。**人材不足ではなく雇用の魅力不足**、これを改善。**社会人継続教育インフラ整備必須**。

# 5-14. トランプ氏を支持したフロリダ州有権者が 典型的な左派の提案である最低賃金引き上げ法を可決！

All punditry aside, in the end it looks like voters decided that what we pay low-wage workers simply isn't enough. **A livable wage for a household with two working adults and two children would be \$16.14 per hour for Florida as a whole** and \$15.57 in Brevard County, according to the Living Wage Calculator by the Massachusetts Institute of Technology.

Florida's current minimum wage is **\$8.56**, The Legislature had refused to raise it.

すべての専門家は別として、結局、有権者は私たちが低賃金労働者に支払う金額だけでは十分ではないと判断したようです。マサチューセッツ工科大学の生活賃金計算機によると、働く大人2人と子供2人の世帯の生活賃金は、フロリダ全体で1時間あたり16.14ドル、ブレバード郡で15.57ドルになります。フロリダの現在の最低賃金は**8.56ドル**ですが州議会はそれを上げることを拒否していました。しかし今回の住民投票で可決！



課題1：日本の現状を長期的に改善するために、観光業を利用した今後20年の日本の方向性について5分以内で戦略説明せよ。

(1) 現状認識 (2) 理想像設定 (3) そこに30年で到達する手段としてどういう政策提示するか



# 5-15.オーランドの潮流

- ユニバーサルスタジオオーランドは従業員組合が無いが、経営陣が自主的にこの経営判断をした点、世界の流れを理解する必要あり。
- 正社員・アルバイトの区別無しに昇給。
- 組合の有るWDWは3年前に2021年10月を目途に時給\$15にする決定済

パート・アルバイト含めた従業員の生活・人生が設計できる年収水準にしないと産業界の魅力不足(人出不足ではなく、業界魅力不足)。それを是正すべきという経営陣の判断でこういう動きが出ている。(株主価値至上主義からの修正)。

- 売上急復興に起因する労働市場の需要急拡大
- 市場時給の急上昇
- 時給労働者の年収、構造的な改善



## Universal hikes base pay to \$15 an hour at Florida resort

Universal Orlando Resort is raising its starting minimum wage to \$15 an hour

By Associated Press

May 27, 2021, 2:08 PM • 2 min read



The Associated Press

FILE- In this Oct. 22, 2015 file photo, park guests relax and cool off with a water mist under the gl. [Read More](#)

ORLANDO, Fla. -- Universal Orlando Resort announced Thursday that it's raising the starting minimum wage at the Florida theme park complex to \$15 an hour.

Universal says the higher wages apply to both full and part-time workers starting June 27. That makes Universal the first resort in central Florida's theme park mecca to raise its base pay to \$15 an hour, though unionized workers at its cross-town rival, Walt Disney World, three years ago approved a contract raising the hourly minimum to \$15 by October 2021. Universal workers aren't unionized.



# 5-16. 沖縄観光産業戦略案策定の3ステップ

最終スライド

## • 現状把握

- 一人当たり県民所得47位(239万円：2018年：国内平均319万)
- 非正規職員率43.1% (全国最高値：国内平均38.2%)
- 母子世帯率2.6% (全国最高値：国内平均1.4%) @年収187万円
- 大学進学率40.8% (全国最低値：国内平均55.8%)

## • 理想像設定

- 一人当たり県民所得10位以内、又は国内平均額達成
- 非正規職員率国内平均率まで減少
- 母子世帯年収300万円の達成。複数業務掛持ち不要に。
- 大学進学率55%達成。 専修学校との戦略的連携構築。

## • 現状から理想像到達の期間設定

- 10年間で目に見える(=定量的な) 成果出す。HOW? どう実現するのか？
  - 教育インフラ設備投資。社会人向け継続教育・オンライン教育。
  - 稼げない鎖国日本の観光学ではなく、世界標準のホスピタリティ経営学に移行。沖縄出身者で世界の観光産業経営で勝負出来る人材育成→そのレベルの世界水準経営人材が戻れば最強。
  - 観光消費総額＝一日消費額×滞在日数。東アジア圏過度依存から欧米長距離客誘客に。
- 観光関連産業経営者がCOVID-19後の人出不足状態出現時に勇気をもって時給上昇させ、優秀な人材を正社員化する事が、第一歩。英語能力に大幅手当支給。